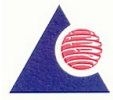

Stanford Systems UK Ltd

Online Management of Interpretive Services (OMIS)

User Manual for Customer Booking Staff

Version 4.1

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User Manual for Customer Booking Staff

1. Introduction and Overview

1.1 Overview

The OMIS system allows remote users to book and schedule appointments for language interpreters. The system is Web based, which means that any users that have an active Username and Password are able to use the system via the NHSNet. In the case of OMIS users, they can access the system via the Intranet.

NHS Organisations such as GRIP provides language interpretation services to a number of organisations, including healthcare, Social Services, housing and occasionally solicitors.

The services provided include the following:

- Face to face interpreting
- Specialised interpreting in sensitive areas such as mental Health and HIV
- Telephone interpreting, normally only provided when unable to provide a face to face interpreter
- Translation of documents and letters.

Rapid growth of the NHSNet and e-applications within the NHS caused the Interpretive Service Providers to consider providing their service on the Web.

The OMIS system should allow the NHS to improve the service provided to their customers and also allow staff resources to be diverted from manual bookings to on-line support.

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2. Organisational Administration

This section describes the users of the system:

2.1.1 Systems administrator

The objective of the Systems Administrator is to ensure the efficient running of the OMIS system.

Accepts or rejects on-line applications from customers for new accounts. Accepts or rejects on-line applications from OMIS users, customers and interpreters.

Configure reports for on-line users. Configure user access to the on-line system

2.1.2 Customer support officer

The objective of the Customer support officer will be to provide support to customers via the on-line system, telephone, text-messaging and email. This is primarily for unconfirmed booking requests. The support will be offered for bookings where the interpreter has tentative availability and also where an interpreter is not available for a particular date/time. The support officer will need to call interpreters in order to fill the slots.

2.1.3 Interpreter support officer

The objective of the Interpreter support officer will be to provide on-line, telephone, text-messaging and email support for interpreters so that the interpreter's diary gives an up-to-date view of availability. This role will also play a part in assisting the Customer Support Officer complete unconfirmed booking.

2.1.4 Finance officer

OMIS user who requires finance information for invoicing and payments

2.1.5 Interpreter

Mixture of employees and freelance, full-time and part-time staff. There are approximately 640 interpreters, approximately 70% of who are active.

2.1.6 Customer Administrator

Responsible for creating customer Account and users. This user is based at the customer site.

2.1.7 Customer bookings officer

Responsible for creating and following bookings at the customer site.

2.1.8 Summary of users of the OMIS System

Name	Description	Type
Service manager	In charge of all staff at the Host Site	OMIS user
Performance manager / Systems administrator	Reports to the service manager and Responsible for the interpreters and all other staff	OMIS user
Customer support officer	Provide support to customers	OMIS user
Interpreter support officer	Provide support to interpreters	OMIS user
Finance officer	Uses Finance information for payments and invoicing	OMIS user
Interpreters	Mixture of employees and freelance, full-time and part-time staff. There are approximately 640 interpreters, approximately 70% of who are active.	Interpreter
Customer Administrator	Responsible for Creating customer Account and users within the customer site	Customer
Customer bookings officer	Responsible for making bookings	Customer

3. System Administration and Registration

This manual has been created for Customer Users. It describes all the tasks that are necessary to ensure the efficient running of the System. The first section describes the registration process that the Customers carry out. This does not apply to Users; however, it provides details on how administrator would register the respective organisations and departments.

This section is written to familiarise the users with the System Administration and registration process. Customers and users must be able to register on the system and receive the required activation/deactivation from the administering organisation.

3.1 Customer Registration

3.1.1 Account Holder Registration

The Administrator at the Customer Site will need to create the account for the Customer and the Systems Administrator. This will need to be started at the Sign-in form. The administrator will not be able to login-in with a user id and password unless this account is created. The Administrator or Account Manager will need to follow this process. The process is started by clicking the 'Register' button on the Sign-on form.

On clicking the 'Register' button for the first time an 'Anonymous account' is created. It is this anonymous account that is used to register all subsequent accounts and users with the 'Register' Button. The 'Register' button is only to be used for creating NEW customer accounts and should NOT be used to register existing users of the same organisation.

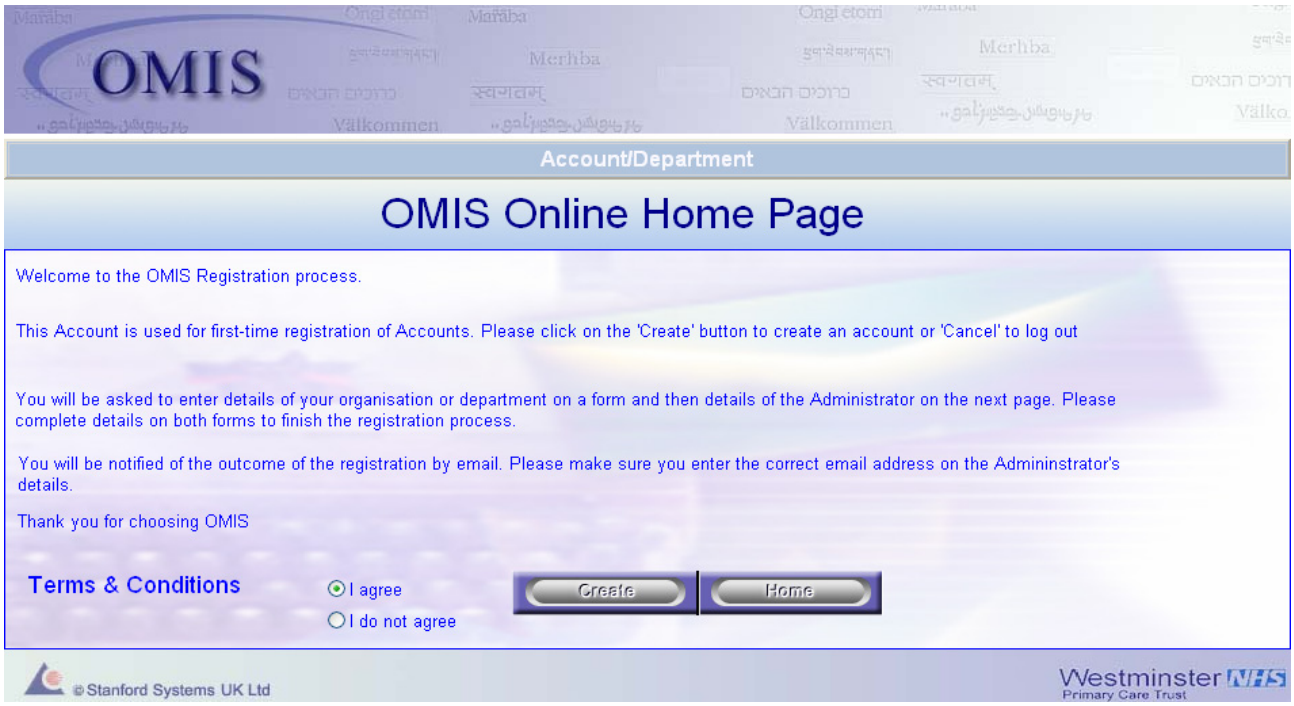
The procedure for opening this account is shown below:

Click the 'Register' Button

This will take you to the 'OMIS Online home Page'. This will give the instructions for registering an account. You will also be asked to agree to the Terms and Conditions for creating an account with OMIS.

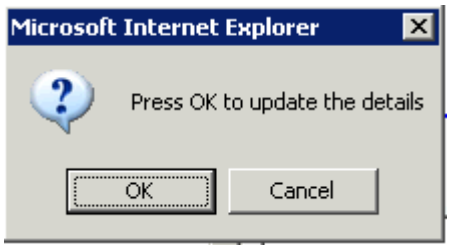
3.1.2 Agree Terms & conditions

Select the 'I Agree' Terms & Conditions and then Click on the 'Create' button so that your account details can be entered.


OMIS
Account/Department
OMIS Online Home Page
Welcome to the OMIS Registration process.
This Account is used for first-time registration of Accounts. Please click on the 'Create' button to create an account or 'Cancel' to log out
You will be asked to enter details of your organisation or department on a form and then details of the Administrator on the next page. Please complete details on both forms to finish the registration process.
You will be notified of the outcome of the registration by email. Please make sure you enter the correct email address on the Admininstrator's details.
Thank you for choosing OMIS
Terms & Conditions
I agree
I do not agree
Create
Home
© Stanford Systems UK Ltd
Westminster NHS
Primary Care Trust

3.1.3 Account Details - 'Required Fields' and Validation

If you click on the 'Submit' button without entering any data and then press 'OK' to update the details,



Then the error messages for the required fields will be displayed. These are the fields where information must be entered in order to 'Register' the account.

You may have noticed that messages are not displayed for the drop-down list boxes although these are mandatory. This is because a default value is always displayed in the dropdown list box. You may select another value, if required.

A summary of the error messages is displayed at the top of the form and a star (*) is displayed beside the field that is required.

OMIS
Account/Department
OMIS Online Home Page
Welcome to the OMIS Registration process.
This Account is used for first-time registration of Accounts. Please click on the 'Create' button to create an account or 'Cancel' to log out
You will be asked to enter details of your organisation or department on a form and then details of the Administrator on the next page. Please complete details on both forms to finish the registration process.
You will be notified of the outcome of the registration by email. Please make sure you enter the correct email address on the Admininstrator's details.
Thank you for choosing OMIS
Terms & Conditions
I agree
I do not agree
Create
Home
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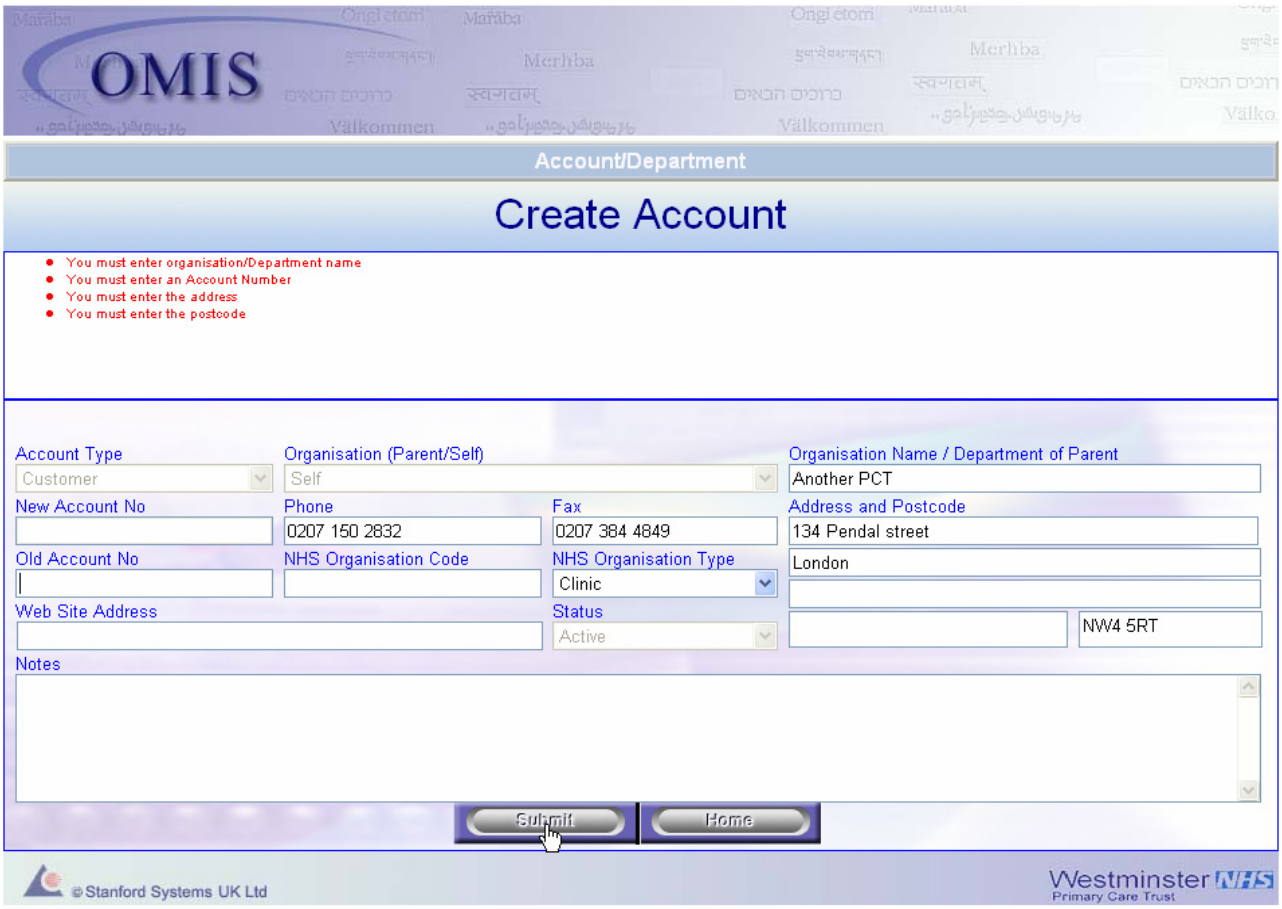
Enter the details for your Account. Details of the 'Another PCT' account are shown below. Any fields that still generate an error will display the Star (*) as soon as the typing is complete. E.g. the postcode will display an error message as soon as an invalid postcode is entered.

The Account Type is set to 'Customer' by default. And the 'Organisation' to 'Self'. This means that the 'Account Holder' Account needs to be defined First and then any departments. 'Another PCT' is being registered as the 'Parent' or Account Holder organisation and will be responsible for administration and payments of the departments that will subsequently registered. This is the method used for registering the Customer account of all Parent Organisations, where the Customer is initiating the registration process.

The other option is for staff at the Hosting site to enter the details of the organisation and activate the accounts.

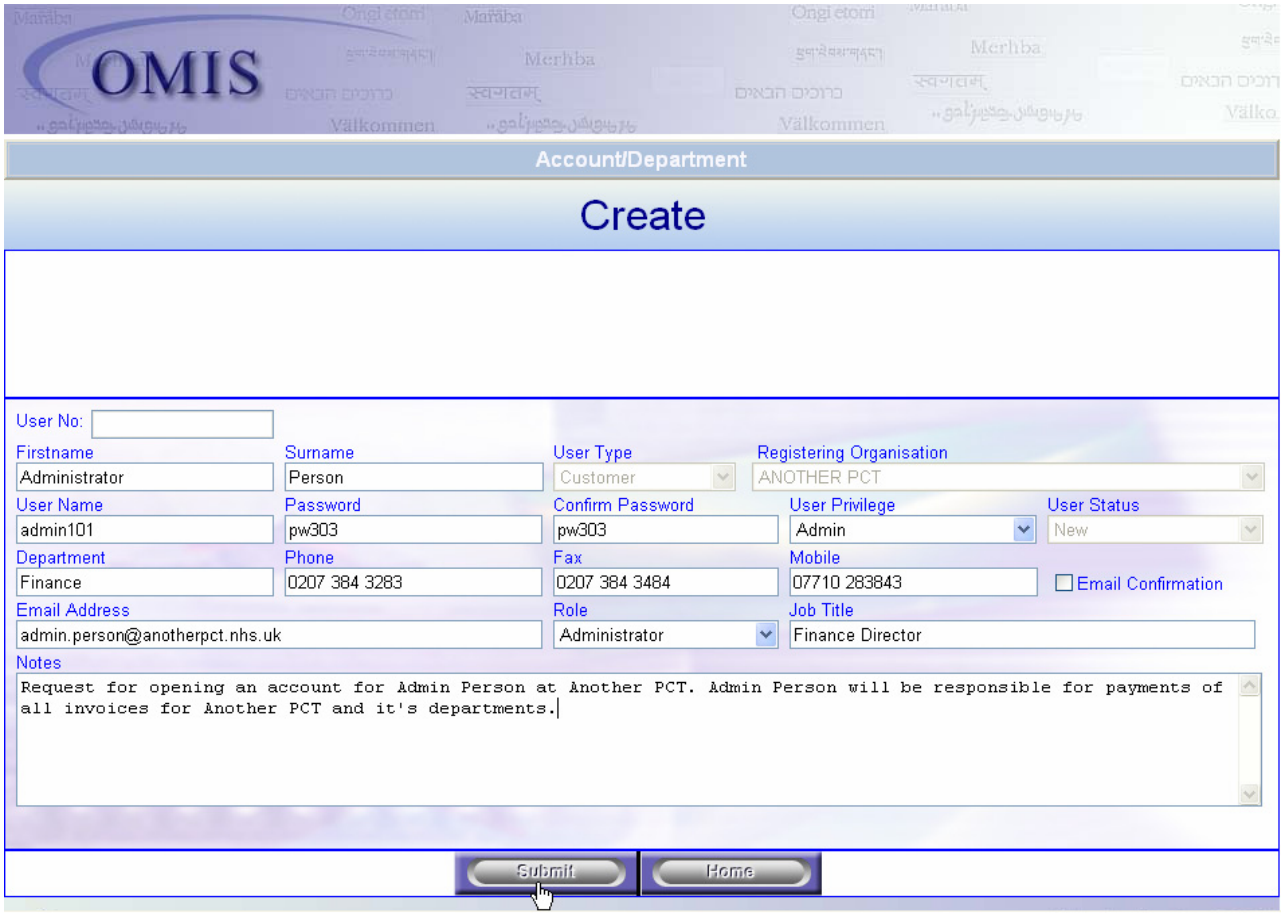
On entering the details, once the postcode is corrected, the (*) error will disappear.



If the postcode is invalid and the 'Submit' button is pressed, then the form will be re-displayed with the appropriate error. On correcting and re-submitting, the error will disappear and the details will be saved on the on-line system.

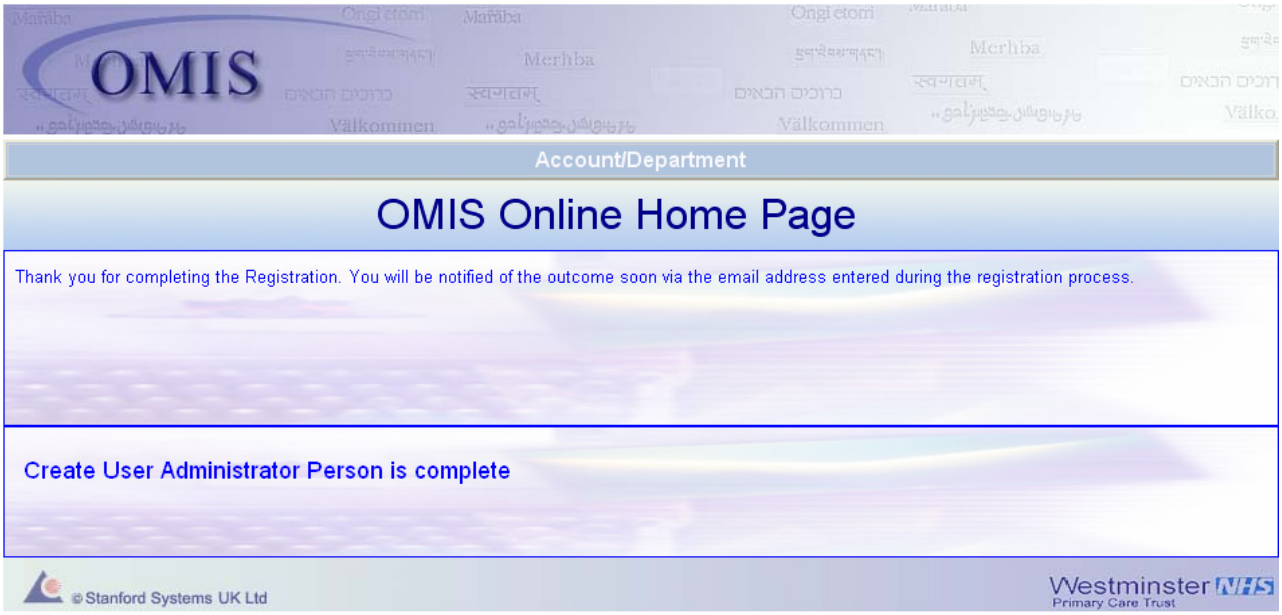
The start date and the end dates for the account do not need to be entered. These will be generated and displayed by the system as appropriate.

Once the account details have been entered, the Administrator details for this account will be requested as shown. Enter the details for the 'Administrator'. Example details are shown below for 'Another PCT'. Please make sure that you note the password that you have used.



Again, any mandatory fields and error messages will be displayed on top of the form. Make sure all the details are entered and submit the form, confirming the update.

3.1.4 Registration complete for 'Another PCT' Account


OMIS
Account/Department
OMIS Online Home Page
Thank you for completing the Registration. You will be notified of the outcome soon via the email address entered during the registration process.
Create User Administrator Person is complete
© Stanford Systems UK Ltd
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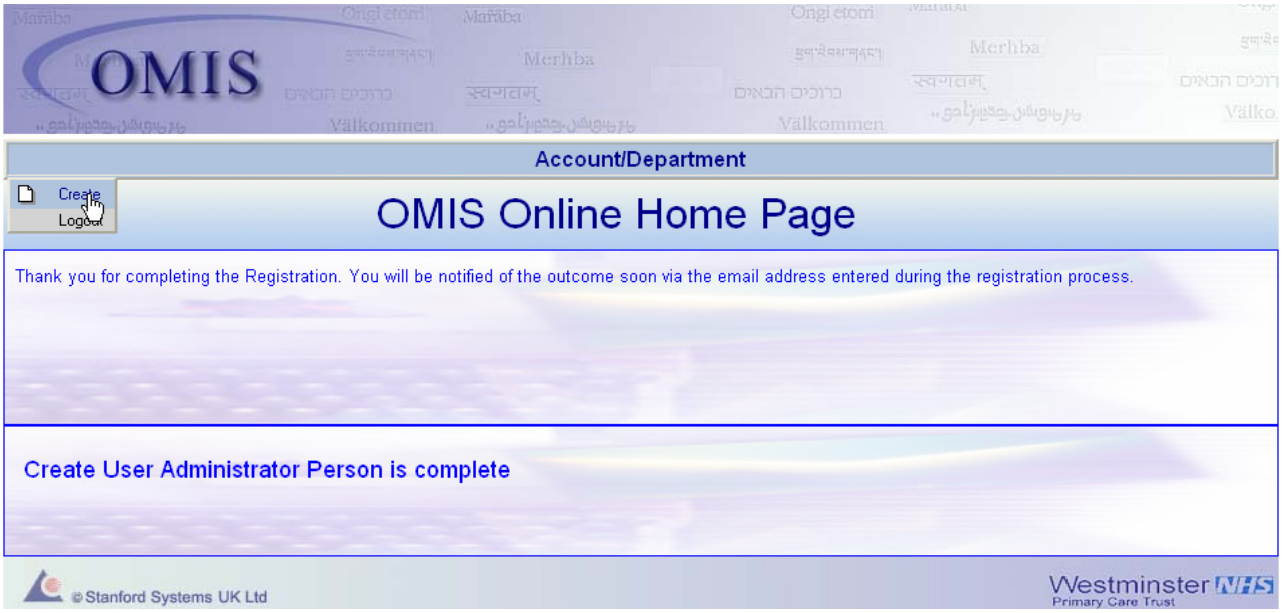
Primary Care Trust

3.1.5 Creating Departments or Clinics


OMIS
Account/Department
Create
Logout
OMIS Online Home Page
Thank you for completing the Registration. You will be notified of the outcome soon via the email address entered during the registration process.
Create User Administrator Person is complete
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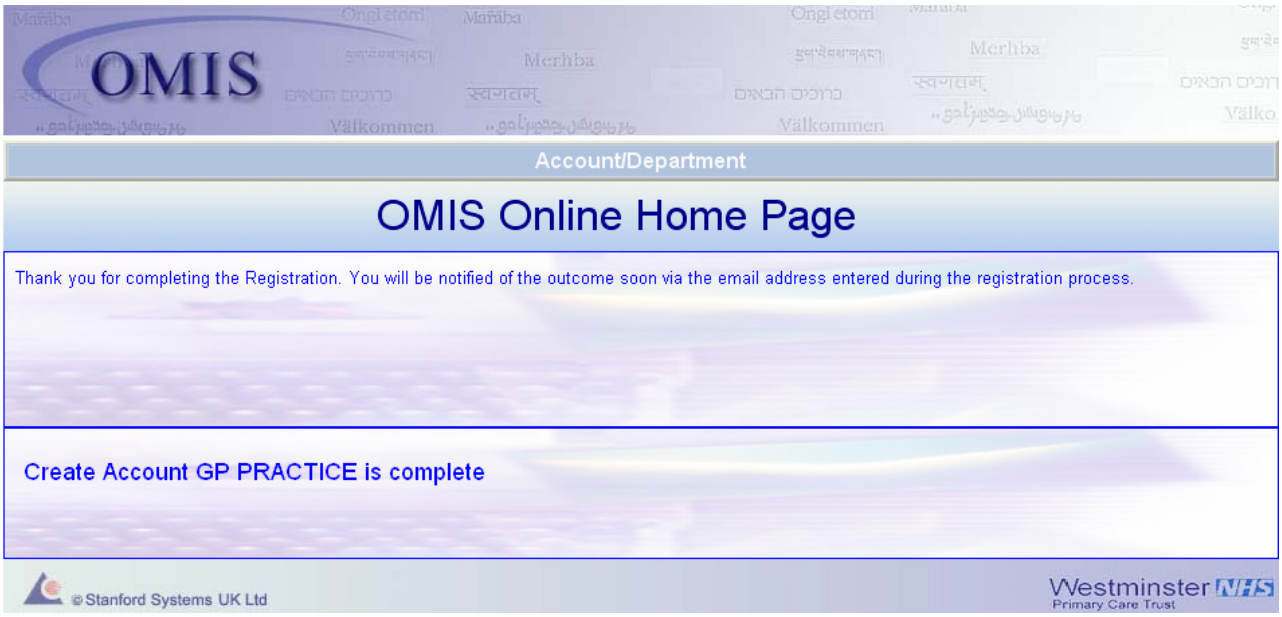
Once the Account Holder 'Account' has been created, you may create the departments for your organisation. These can be created by using the menu option as shown above. Click on the 'Create' button and enter the details as shown below.

This time you'll notice that the Parent organisation is set to the 'Account Holder' account that was previously created (Another PCT). Enter the details for the department and press the 'Submit' button.


OMIS
Account/Department
OMIS Online Home Page
Thank you for completing the Registration. You will be notified of the outcome soon via the email address entered during the registration process.
Create Account GP PRACTICE is complete
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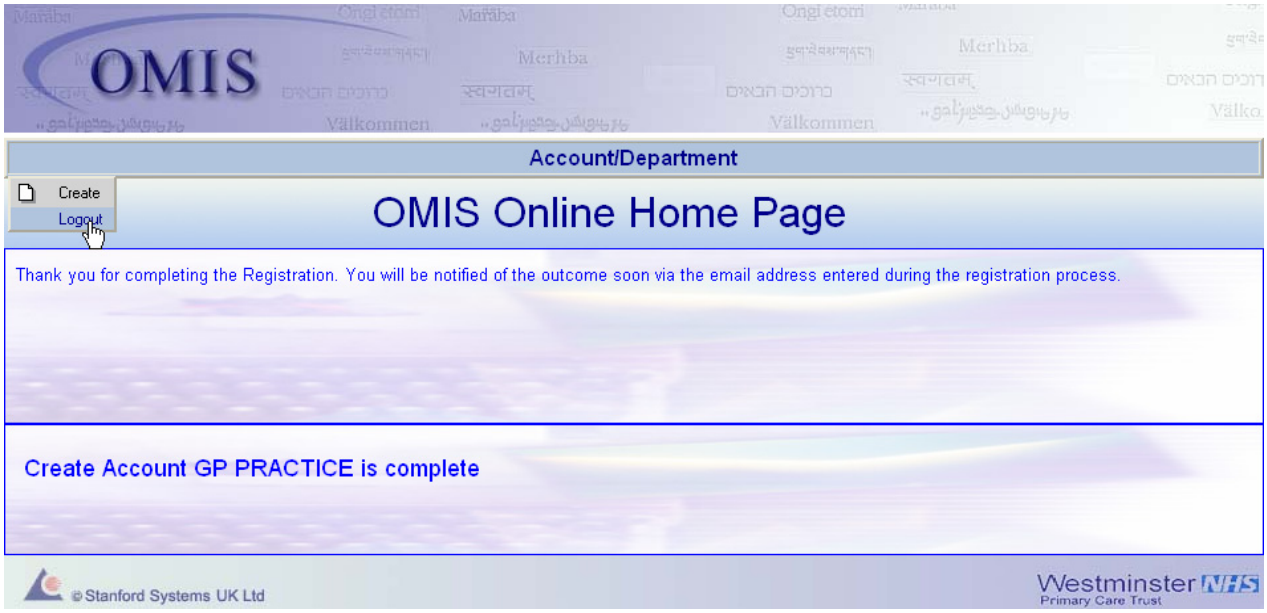
The screen above shows the confirmation on creating the department. You can create as many departments as you require for your organisation. These will then be reviewed by OMIS staff. The Account Holder and departments will be activated by OMIS staff as appropriate.

You can logout from the system after all the departments have been completed by using the 'Logout' menu option as shown below:


OMIS
Account/Department
Create
Logout
OMIS Online Home Page
Thank you for completing the Registration. You will be notified of the outcome soon via the email address entered during the registration process.
Create Account GP PRACTICE is complete
© Stanford Systems UK Ltd
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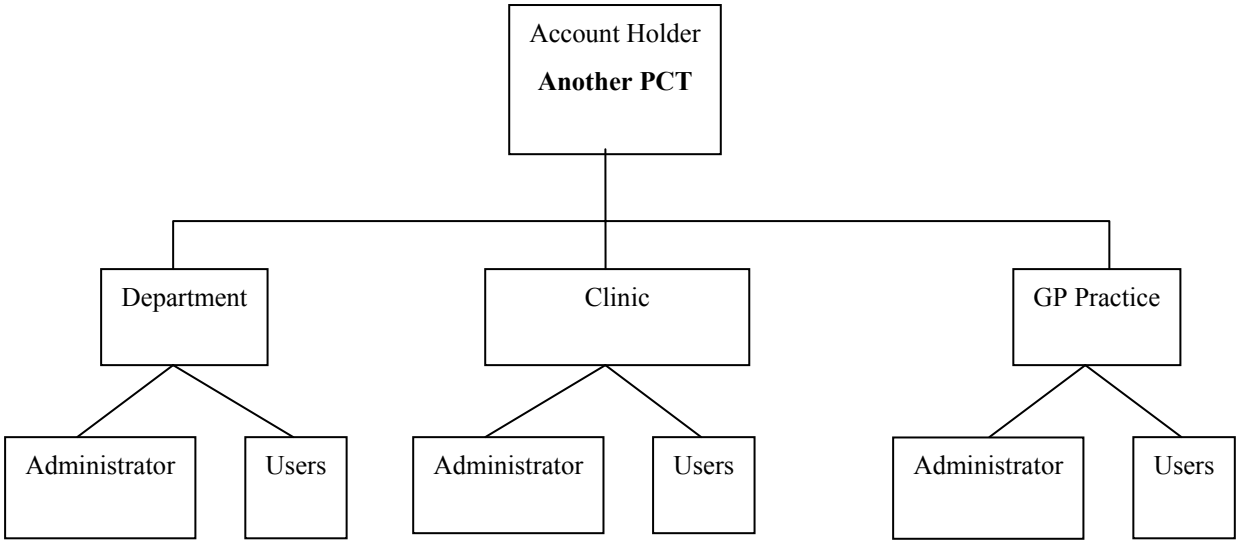
Primary Care Trust



The Organisational structure for 'Another PCT' is shown above. The Registration process allows the Account Holder to create this structure. OMIS administrators will then authorise the structure by activating the various accounts and notifying the Account Holder administrator. OMIS Administrators will also create the administrator (users) at each of the departments and notify the users of the details in order to login to the system. The administrators at each department can then create

3.2 Maintaining Customer Accounts

Customer accounts can only be maintained by OMIS Administrators. This section describes the tasks that are required to Create, Amend, Activate and Deactivate Customer Accounts.

3.2.1 Login into System

In order to carry out the various administrative tasks the required security access must be supplied to all Customer Administrators. Whenever an administrator or user is created, the account requires activation. I.e. OMIS administrator will have to activate the account.

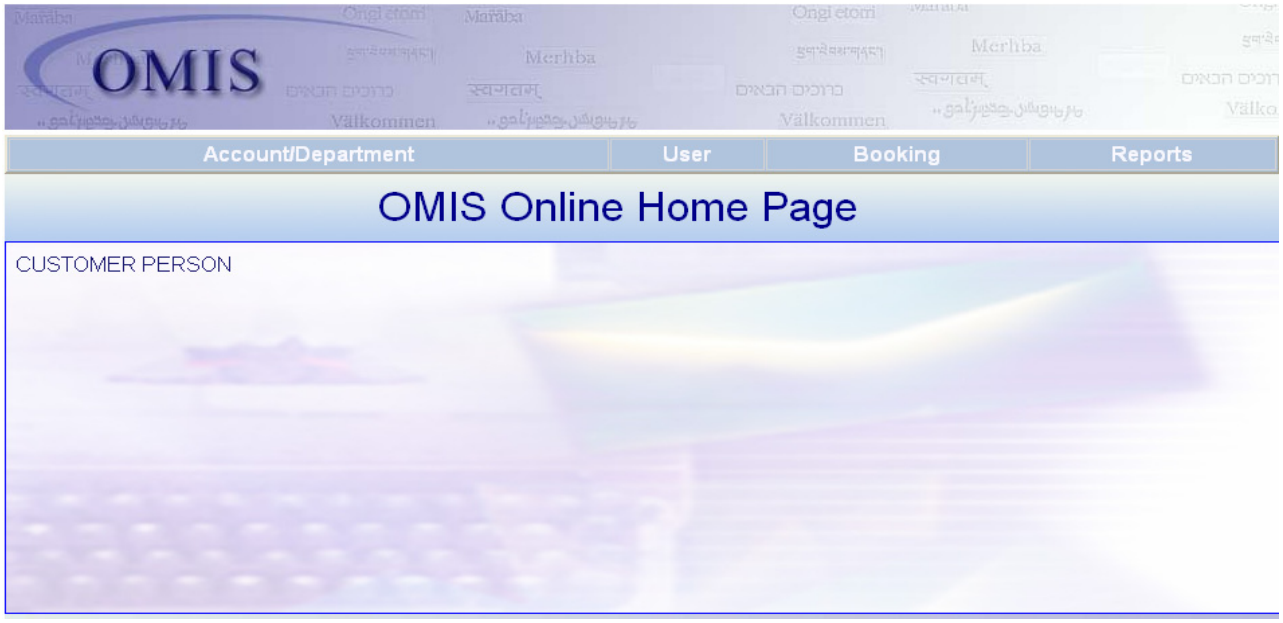
3.2.2 Login Validation

Pressing the submit button with out entering any information will display error messages on invalid username and password.

3.2.3 Valid Login

Login using the username and password provided by your OMIS administrator or that used during the registration process.

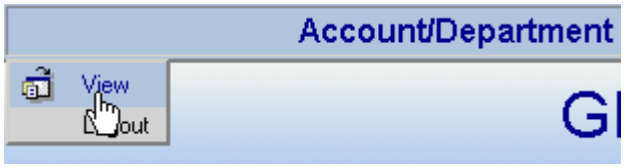
This should allow you to login, if the account details have been entered and the account is active


OMIS
Account/Department
User
Booking
Reports
OMIS Online Home Page
CUSTOMER PERSON

3.2.4 OMIS Account Privileges

3.2.4.1 Administration of Customer Accounts

The user should be able to access the following menu options for the Account/Department option on the system.

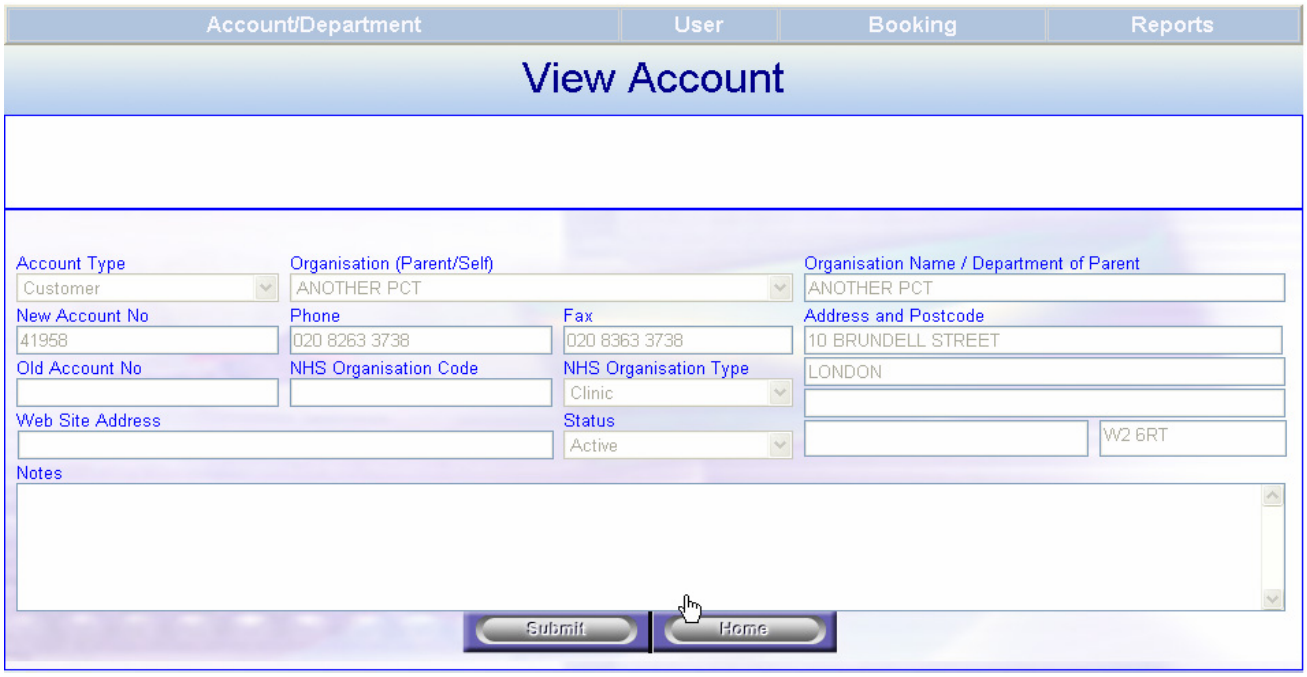


A summary of these options is given below:

View – View customer account details

Logout – Logout from current session

When the view option is selected, the user's own organisation details will be displayed



3.3 Maintaining User Details

The administrator is responsible for maintaining users on the system.

Customer Users – Users at Customer sites

The Customer Administrator can only amend the users at their site to ensure that the details are as accurate as possible on the system. The administrator is also responsible for creating new user accounts.

3.3.1 Customer Users

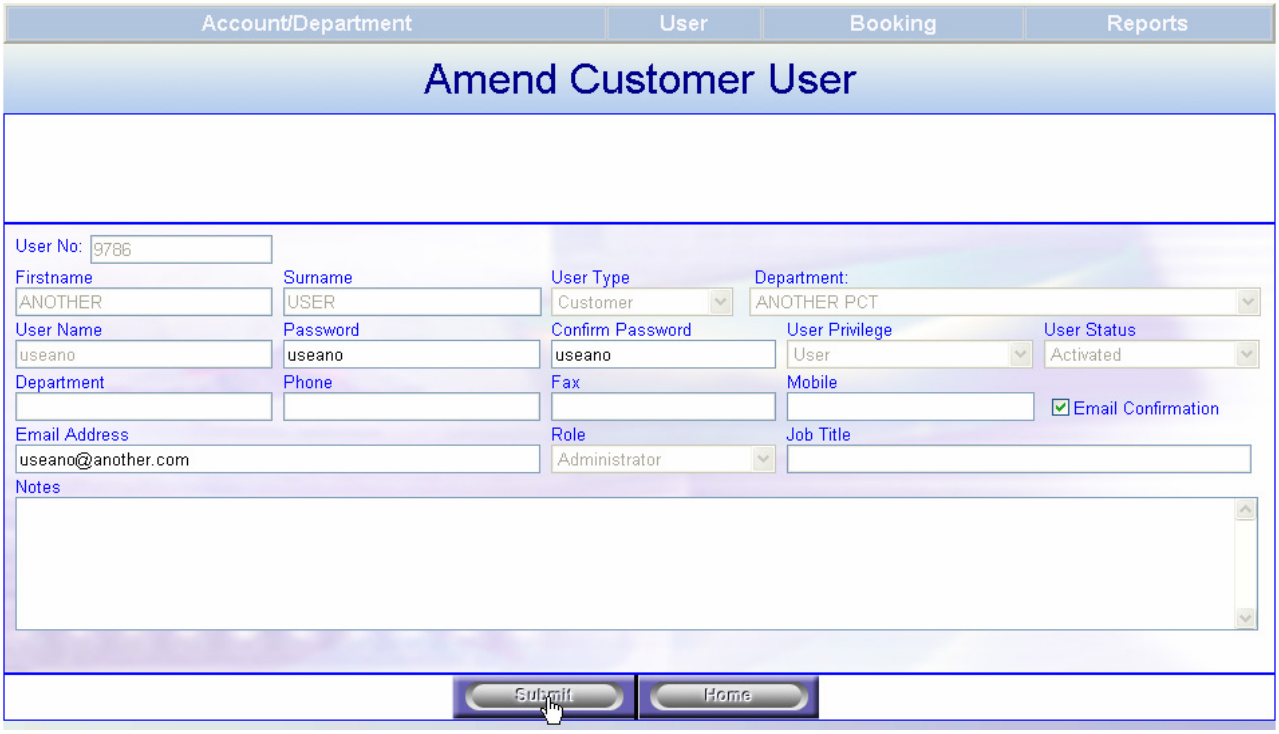
Customer users need to be created by the Administrator. Their username and password can be set by the administrator and can later be changed by the user. The Customer administrator can also be created by the Customer during registration. After activation, the Customer administrator can then create either administrators or users for their own organisation.

In this section the maintenance of Customer users is described so that administrators can carry out the appropriate tasks.

3.3.1.1 Amend Customer User Details

In order to amend your user details, select the 'User', 'Amend' option from the main menu:

Amend the password or email address and submit/confirm the details



The above screen will be displayed and you can amend your password or email address as appropriate.

3.3.1.2 View Customer Users

In order to View your user details select the ‘User’, ‘View’ option from the Main Menu:

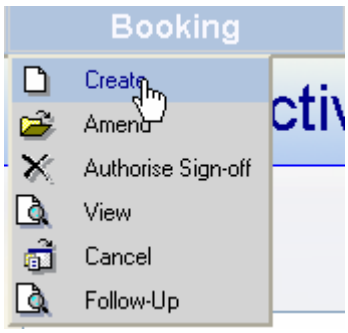
After viewing the details, click on the 'Home' button to return to the Home page. Please note that you cannot amend any User details in the View screen.

3.4 Bookings

This section describes the process for creating and maintaining bookings by Customer staff.

3.4.1 Booking Creation

To create a new booking, select the 'Booking', 'Create' option from the main menu:



The booking Organisation (Department) will default to your organisation..

The mandatory fields (fields that must be entered to create the booking) are displayed in bold highlight:

First name, Surname, Gender of Patient, Language, Appointment Date, Appointment Time, Duration in Hrs and Duration in Minutes.

Enter the details for the Booking as appropriate and then click on the Submit button and confirm the update:

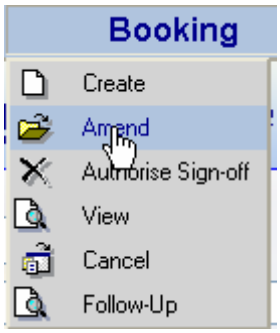
The minimum details in the form above have been entered. You can submit and confirm the booking. Note that the Caller details include all users that have been registered for the respective organisation.

If any of the Mandatory fields are missing, or there is an error in the data, the messages will be displayed at the top of the form in RED and a star next to the field associated with the error.

Once the booking has been created, a message will be displayed as follows: You may want to note the Booking number for future reference.

3.4.2 Booking Amendments

To amend bookings use the 'Booking', 'Amend' option from the main menu



There are two important check fields on the search screen:

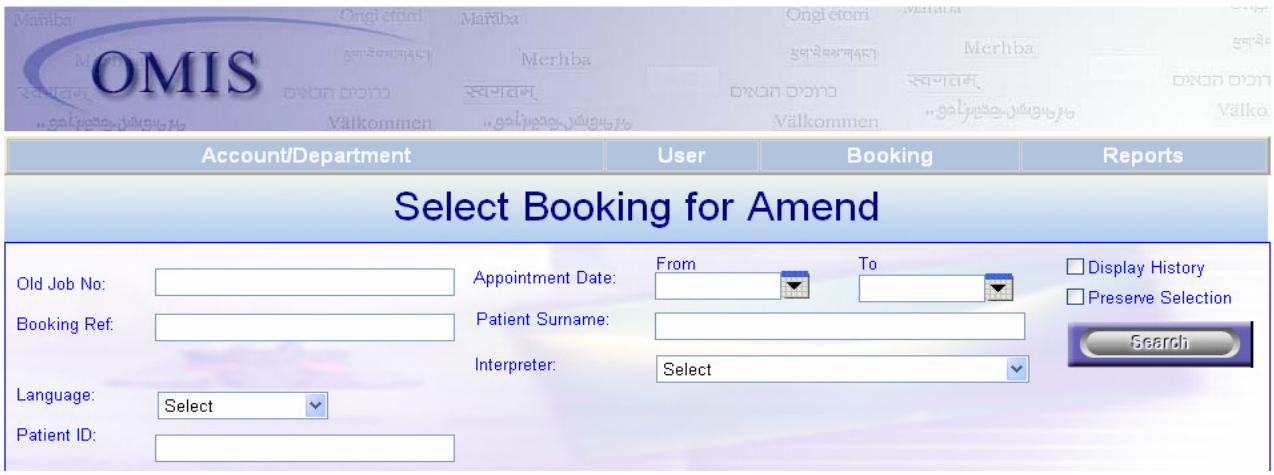
Display History – If this field is checked, then whenever the Booking is displayed, it will also display all the history associated with the Booking – i.e. Booked By (Who Created the Booking), Confirmed By (Who Confirmed the Booking), Sign-off By (Who Signed off the booking).

If this field is checked, it can make the booking screen too long, therefore you may prefer to leave the check off so that the minimum data is displayed.

Preserve Selection – The preserve selection check field allows you to move to other screens and then return to the Booking selection screen with the 'Search Criteria' preserved. E.g. if you choose a particular date range and an interpreter, then after amending the booking, when you return to the Selection screen, this criteria will be preserved. If you uncheck the field the selection data will be cleared and you will get blank selection criteria when you return to this screen.

To continue with the Booking creation – Click on the Button displaying the Customer number (41957) in this case.

The Booking selection screen offers many fields that can be used to search for Bookings:



Old Job No: - This is job number from the 'previous' system.

Appointment Date – From or To. This allows you to enter a start and end date. All bookings found between these dates and that satisfy the rest of the criteria will be displayed

Booking Ref – This is the booking reference number generated whenever a booking is created

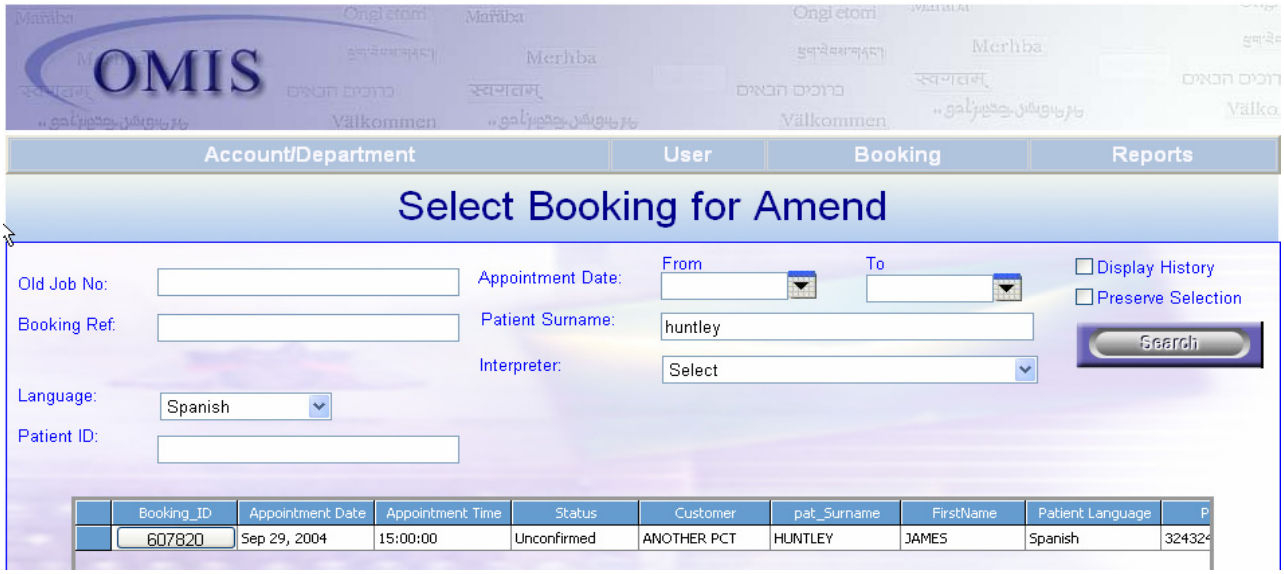
Patient Surname – Enter the full or part of the patient's surname if required for the search

Interpreter – Select an interpreter from the list so that bookings that have been confirmed with this interpreter only will be displayed.

Language – Select a Language so that only bookings for the selected language will be displayed

Patient ID – Enter the Customer patient ID

Postcode – Enter the customer postcode, so that bookings in a particular area can be found.



For our example we have entered the patient's surname and the language to identify the relevant booking. When the booking has been found, click on the button that displays the booking reference number:

Amend any of the fields that require changes and then submit the changes:

3.4.2.1 Booking Lock

There may be occasions when a booking is being confirmed at the same time that a user wants to amend the booking. For example a Customer that has created a booking, may want to amend the time of appointment. If OMIS users are trying to confirm the appointment at the same time, this can cause problems. In this case whoever enters the booking first for confirming or amending will 'Lock' the booking. The second or subsequent users trying to access the booking will receive a message that the booking is locked.

As an example, the customer is amending the booking we created earlier:

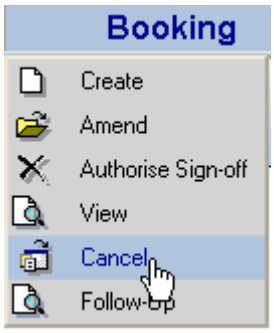
At the same time an OMIS user is attempting to confirm the booking. In this case, the OMIS user will receive a message that the Booking has been locked by the Customer.

3.4.3 Booking Cancellation

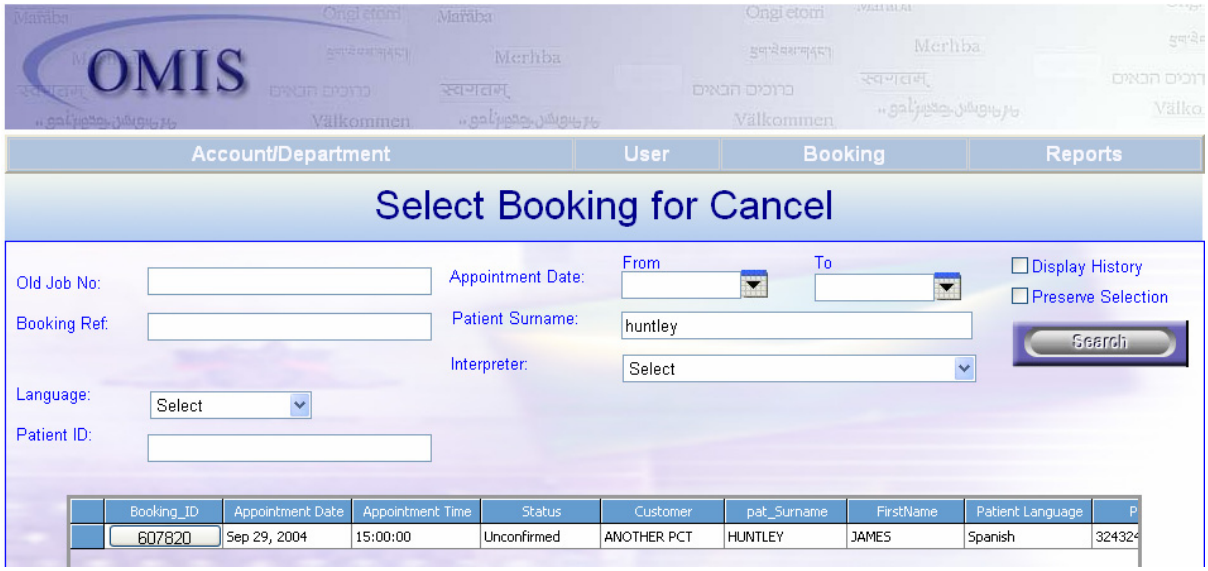
There are occasions when bookings need to be cancelled. When this is done, the job status of the booking will need to be amended to indicate the reason for cancellation:

Please note that Customers can only cancel a booking which has not been confirmed. Once confirmed then OMIS users must be informed so that the Booking can be cancelled and the Interpreter informed.

To cancel a booking, select the 'Booking', 'Cancel' option from the main menu:



You first need to identify the Booking(s) that need to be cancelled. This time the criteria used id the Patient's Surname and Language



Click on the Booking Reference Number to View the Booking and change the status to Cancelled:

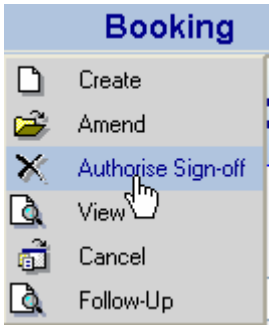
Before submitting for cancellation, select a reason, in this case ‘Interpreter Cancelled’. Then submit the booking by clicking on the ‘Submit’ button and pressing the ‘OK’ button

The message above confirms that the booking has been cancelled

3.4.4 Booking Authorise Sign-off

Once Bookings have been confirmed and the Interpreter has completed the appointment, a completed Job Form is returned indicating that the Booking can be included in the end of month Batch Run for payment.

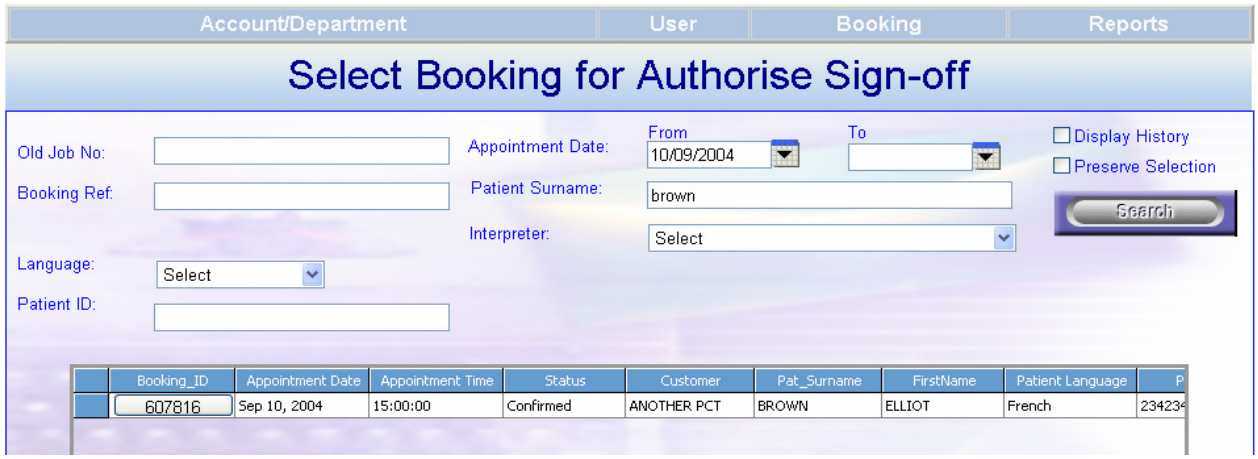
For Bookings to allow invoicing to Customers and Payment to Interpreters, the Bookings must be Signed-off. The menu options that allow this are as follows:



Select the 'Booking', 'Sign-off' option from the main menu:

Future bookings cannot be signed off, therefore only completed bookings will be displayed. The OMIS users need to cross-check the information on the Job Form with the information on the Booking before the Sign-off.

The Signoff forms are received from interpreters are kept in chronological order, therefore a batch of these can be selected at once for multiple signoffs. This is possible by selecting a list of all the signoffs for an Interpreter and then using the 'Next' or 'Skip' button to move to the next selected booking. The skip button is useful in case a Job Form has not been returned by the Interpreter.



In our example case we only have one booking which needs to be signed off.

You can also use the Sign-off screen to create multiple Follow-ups. When in the Booking, the 'Follow-up' button can be used to create additional Follow-ups from the booking that is being signed-off.

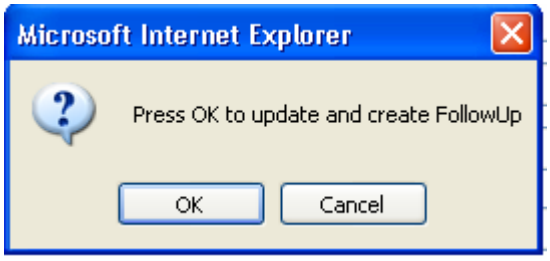
To sign-off the booking you must enter the Arrival time, Interview start time, Interview end time, Appointment Outcome, Customer signoff name (From Job Form) and the Reason for Payment (If required).

If any of these fields are left empty an error message will be displayed.

3.4.4.1 Creating Follow-ups from Sign-off

If you want to create a Follow-up from the Signoff, enter the sign-off details and click on the 'Follow-Up' button

To Signoff and create the Follow-up, click on the Ok button



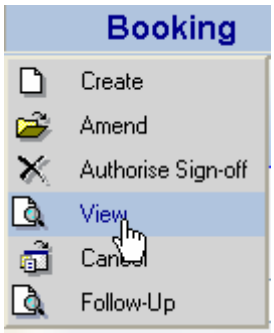
If Follow-up required, then create the follow-up and save the booking.

To create more than one follow-up, use the 'Next >>' button.

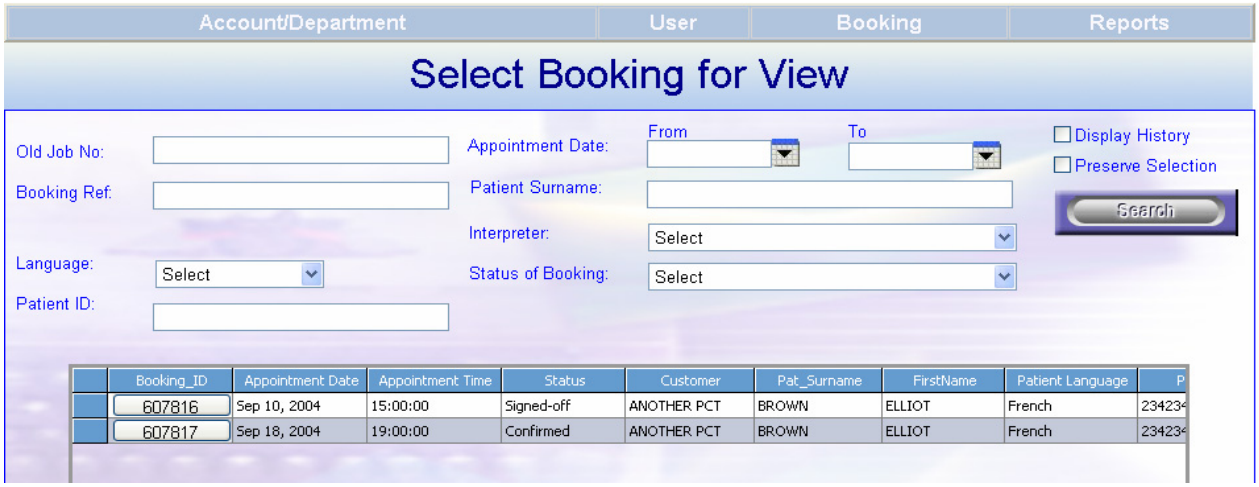
:

3.4.5 View Booking

To view a Booking, select the 'Booking', 'View' option from the main menu:



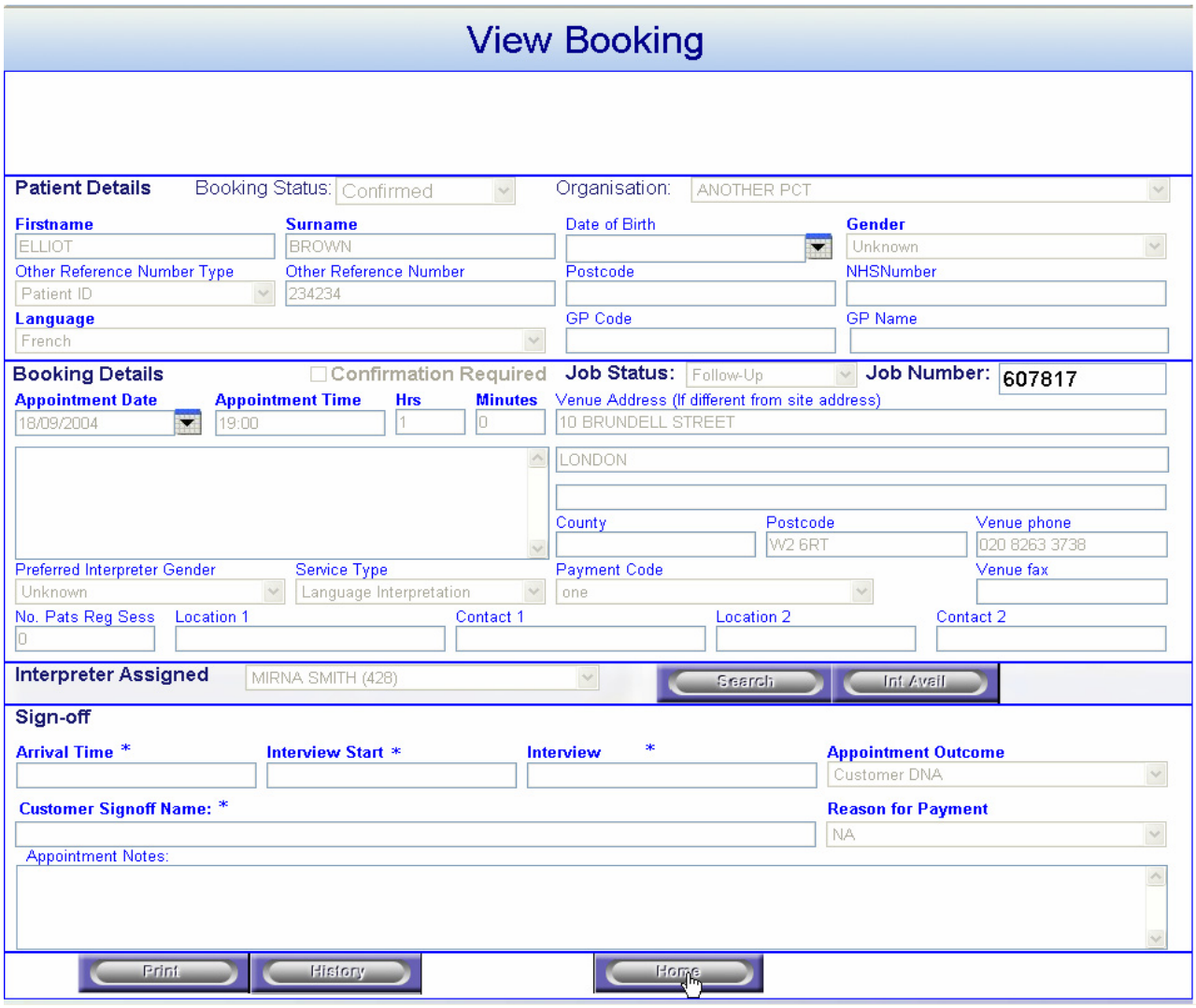
Enter the criteria to find the booking whose details need to be viewed.



You may want to check the 'Display History' box so that all the details for this booking can be viewed:

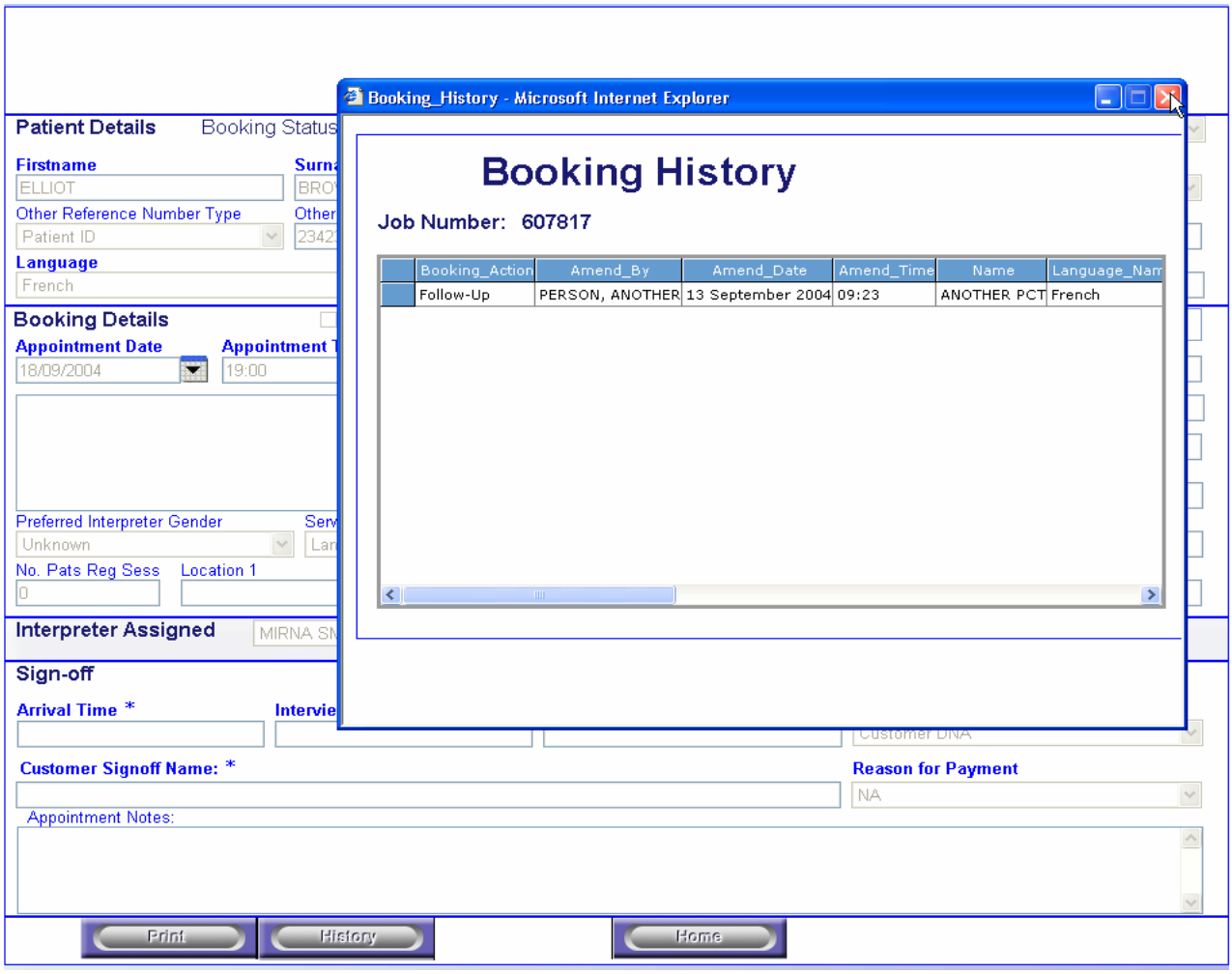
Click on the Booking reference number button to view the details for this booking:

This time the booking details will contain all the historic details such as: Caller details, Booked By, Confirmed By, Signed-off by, Interpreter details. This is because the 'Display History' box was switched on.


View Booking
Patient Details
Booking Status: Confirmed
Organisation: ANOTHER PCT
Firstname
ELLIOT
Surname
BROWN
Date of Birth
Gender
Unknown
Other Reference Number Type
Patient ID
Other Reference Number
234234
Postcode
NHSNumber
Language
French
GP Code
GP Name
Booking Details
Confirmation Required
Job Status: Follow-Up
Job Number: 607817
Appointment Date
18/09/2004
Appointment Time
19:00
Hrs
1
Minutes
0
Venue Address (If different from site address)
10 BRUNDELL STREET
LONDON
County
Postcode
W2 6RT
Venue phone
020 8263 3738
Preferred Interpreter Gender
Unknown
Service Type
Language Interpretation
Payment Code
one
Venue fax
No. Pats Reg Sess
0
Location 1
Contact 1
Location 2
Contact 2
Interpreter Assigned
MIRNA SMITH (428)
Search
Int Avail
Sign-off
Arrival Time *
Interview Start *
Interview *
Appointment Outcome
Customer DNA
Customer Signoff Name: *
Reason for Payment
NA
Appointment Notes:
Print
History
Home

3.4.6 Booking History

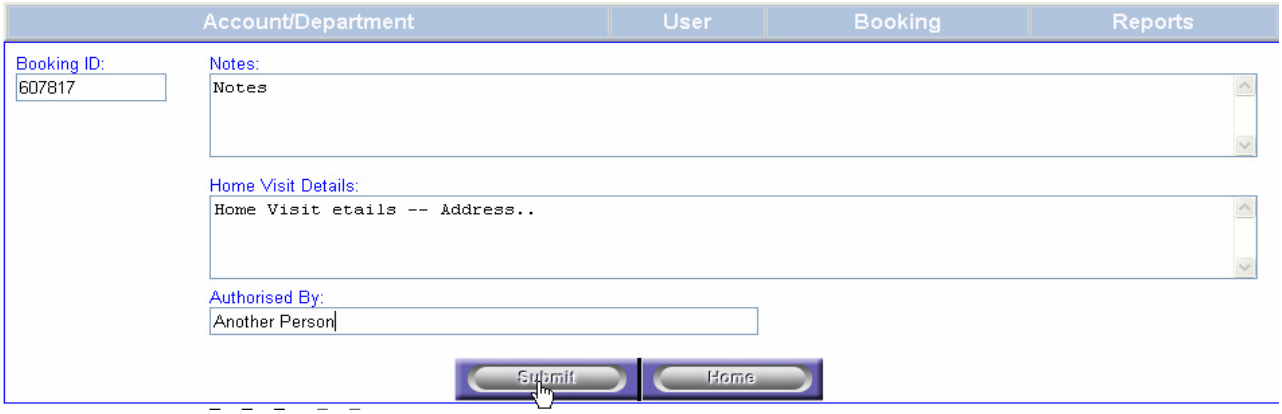
To view full history of a booking click on the 'History' button when the booking is open:



3.4.7 Print Booking

To print booking details, click on the 'Print' button when the booking is open:

Then enter any additional details that you may want to add to the booking and click on the 'Submit' button:



The print preview will be displayed as a report. You can amend the details before the final print/email using Word or Adobe PDF format.

Booking Details

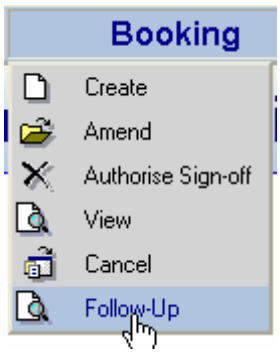
Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

DateOfBirth

Booking Reference	607817
Language:	French
Date:	18-Sep-2004
Time:	7:00 pm
Duration:	1 Hrs 0 Mins
Location:	ANOTHER PCT 10 BRUNDELL STREET LONDON W2 6RT
Phone:	020 8263 3738
Contact:	**Home Visit:**
Contact Phone:	
Pref Gender:	Unknown

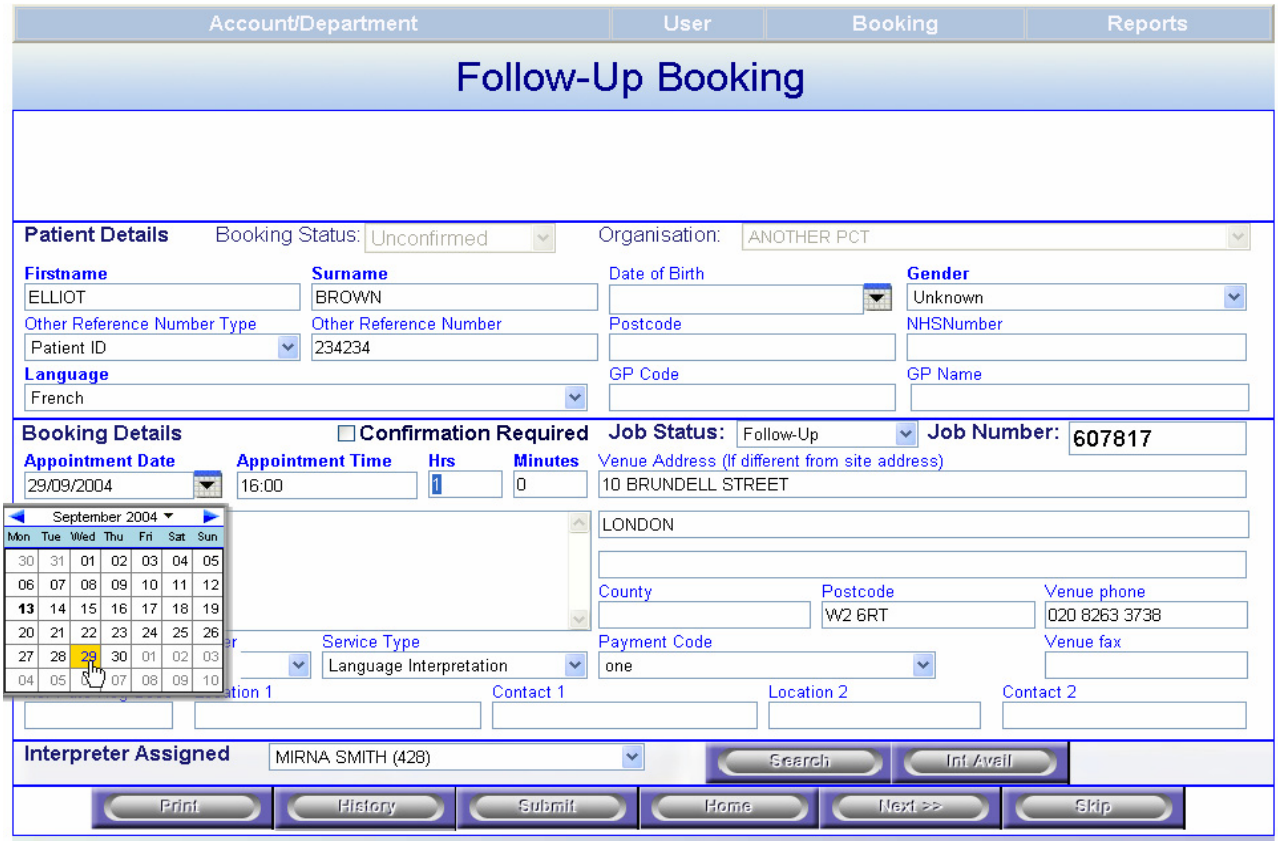
3.4.8 Follow-Up Bookings

To create Follow-Up bookings use the 'Booking', 'Follow-Up' option from the main menu



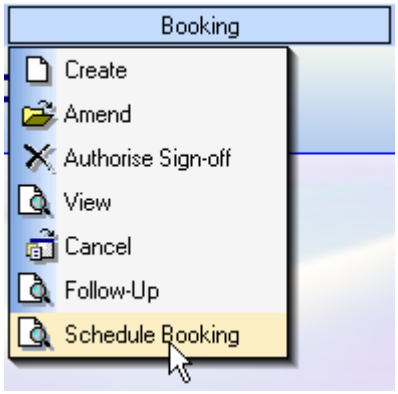
Enter the Booking Reference number of the booking that is to be used for the Follow-up

Enter the Appointment Date and Time. You can then submit and save the Follow-up or use the 'Next' button to create more follow-ups from this one booking.

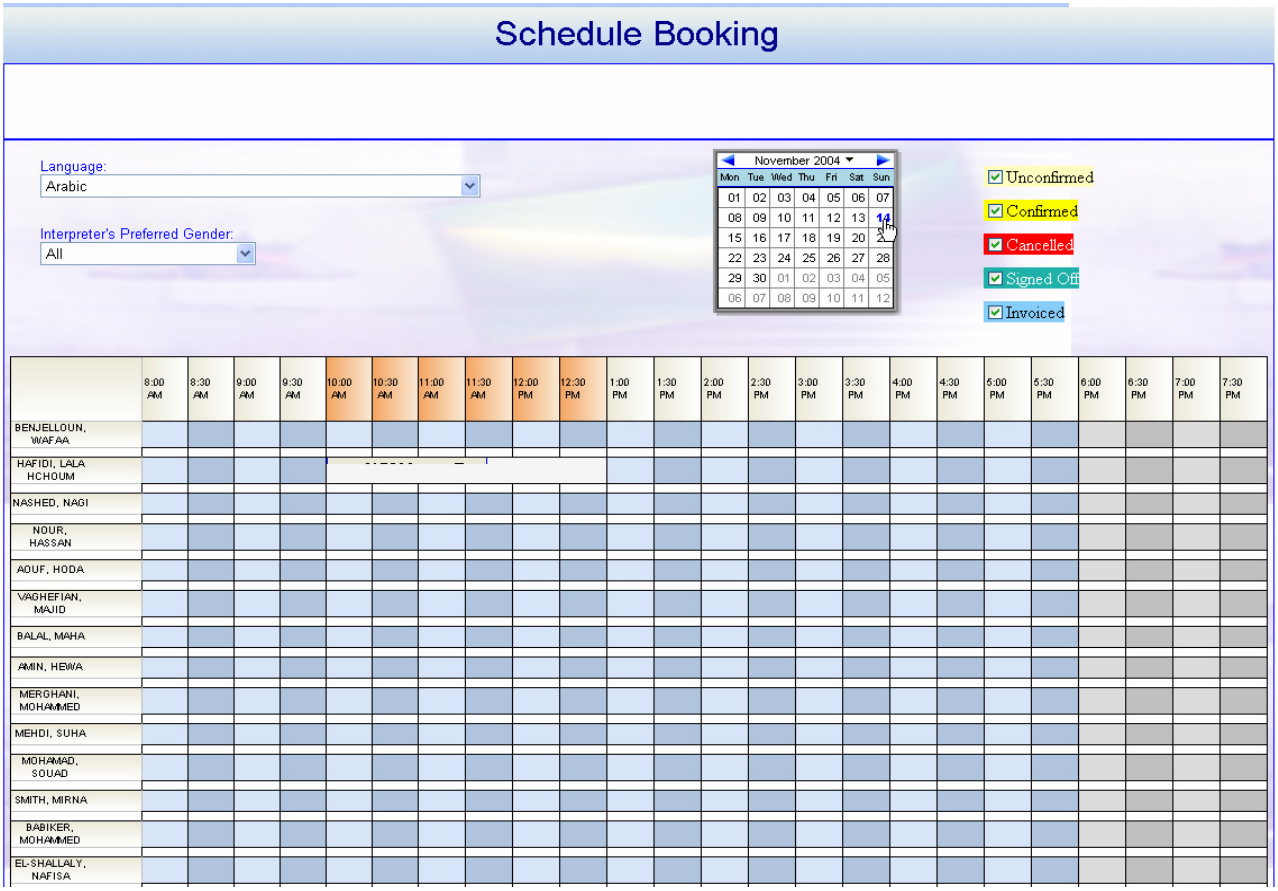

Account/Department
User
Booking
Reports
Follow-Up Booking
Patient Details
Booking Status: Unconfirmed
Organisation: ANOTHER PCT
Firstname
ELLIOT
Surname
BROWN
Date of Birth
Gender
Unknown
Other Reference Number Type
Patient ID
Other Reference Number
234234
Postcode
NHSNumber
Language
French
GP Code
GP Name
Booking Details
Confirmation Required
Job Status: Follow-Up
Job Number: 607817
Appointment Date
29/09/2004
Appointment Time
16:00
Hrs
1
Minutes
0
Venue Address (If different from site address)
10 BRUNDELL STREET
September 2004
Mon Tue Wed Thu Fri Sat Sun
LONDON
County
Postcode
W2 6RT
Venue phone
020 8263 3738
Service Type
Language Interpretation
Payment Code
one
Venue fax
Contact 1
Location 2
Contact 2
Interpreter Assigned
MIRNA SMITH (428)
Search
Int Avail
Print
History
Submit
Home
Next >>
Skip

3.5 Scheduled Bookings

Scheduled Bookings can be accessed via the main menu option as follows:



Click on the 'Schedule Booking' option to enter the Booking Screen



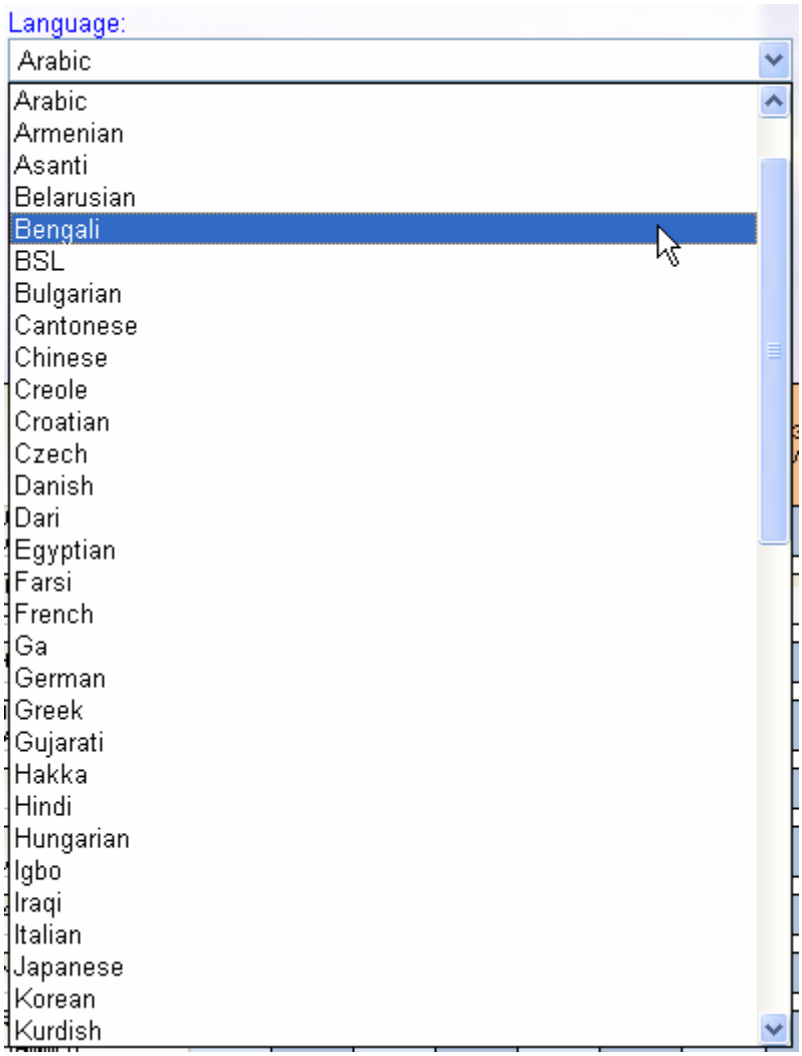
The above screen shows the default display for the Booking Screen. The language defaults to ‘Arabic’ since this is the most used language. The date defaults to today.

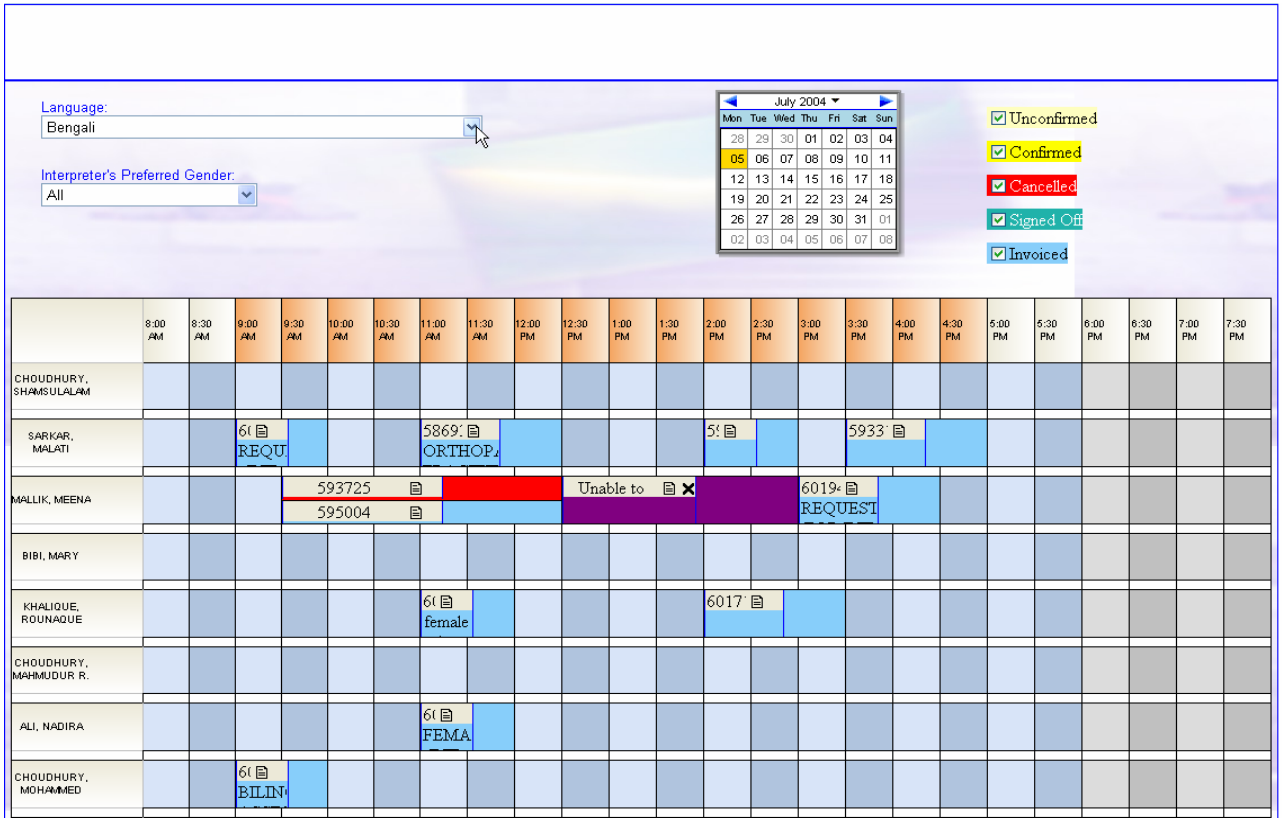
The screen shows all the interpreter’s for the selected language and on the left and their availability on the main screen.

© Stanford Systems, 2004

3.5.1 Selecting the Language

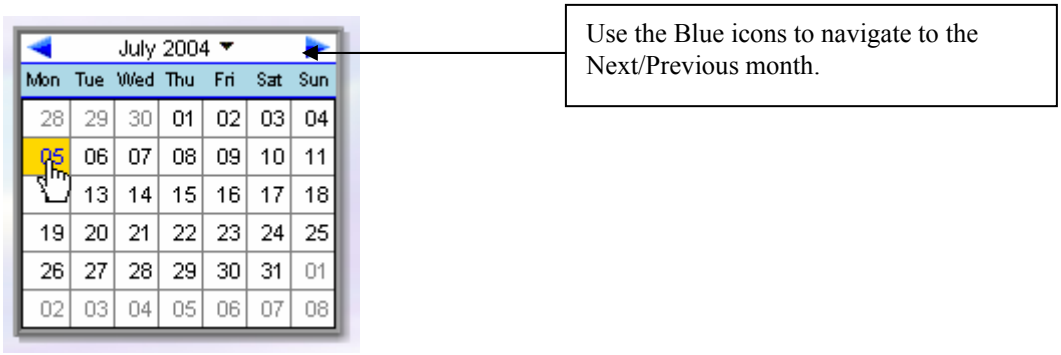
Select the Language for the booking you are interested in. On selecting the Language, the screen will re-display and show all the interpreters for the selected language, 'Bengali' in the screen below.



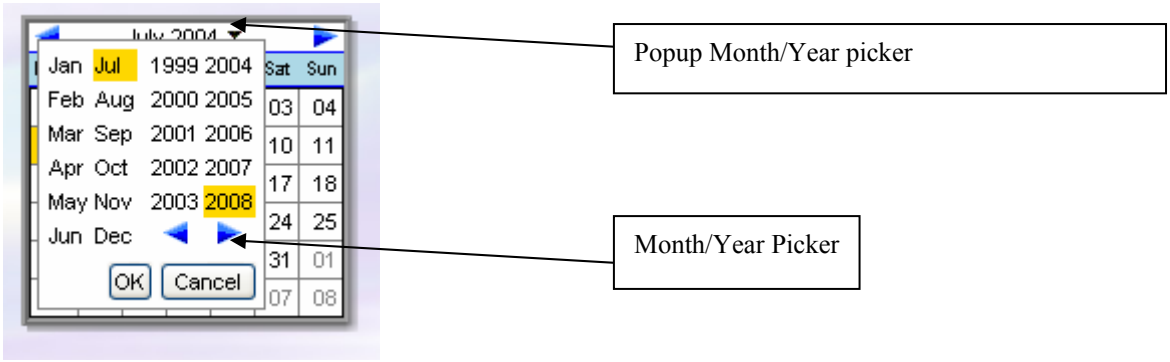

Language:
Bengali
Interpreter's Preferred Gender:
All
July 2004
Mon Tue Wed Thu Fri Sat Sun
Unconfirmed
Confirmed
Cancelled
Signed Off
Invoiced
8:00 AM
8:30 AM
9:00 AM
9:30 AM
10:00 AM
10:30 AM
11:00 AM
11:30 AM
12:00 PM
12:30 PM
1:00 PM
1:30 PM
2:00 PM
2:30 PM
3:00 PM
3:30 PM
4:00 PM
4:30 PM
5:00 PM
5:30 PM
6:00 PM
6:30 PM
7:00 PM
7:30 PM
CHOUDHURY, SHAMSULALAM
SARKAR, MALATI
MALLIK, MEENA
593725
595004
Unable to
BIBI, MARY
KHALIQUE, ROUNAQUE
female
CHOUDHURY, MAHMUDUR R.
ALI, NADIRA
FEMA
CHOUDHURY, MOHAMMED

3.5.2 Selecting the Date

Use the Calendar to select the date that you need for the Booking:



Use the Next/Previous Month picker to view dates for different months of the year. Click on the Day that you want to start viewing the Calendar. In the example above the diary will start on the 5th July 2004.



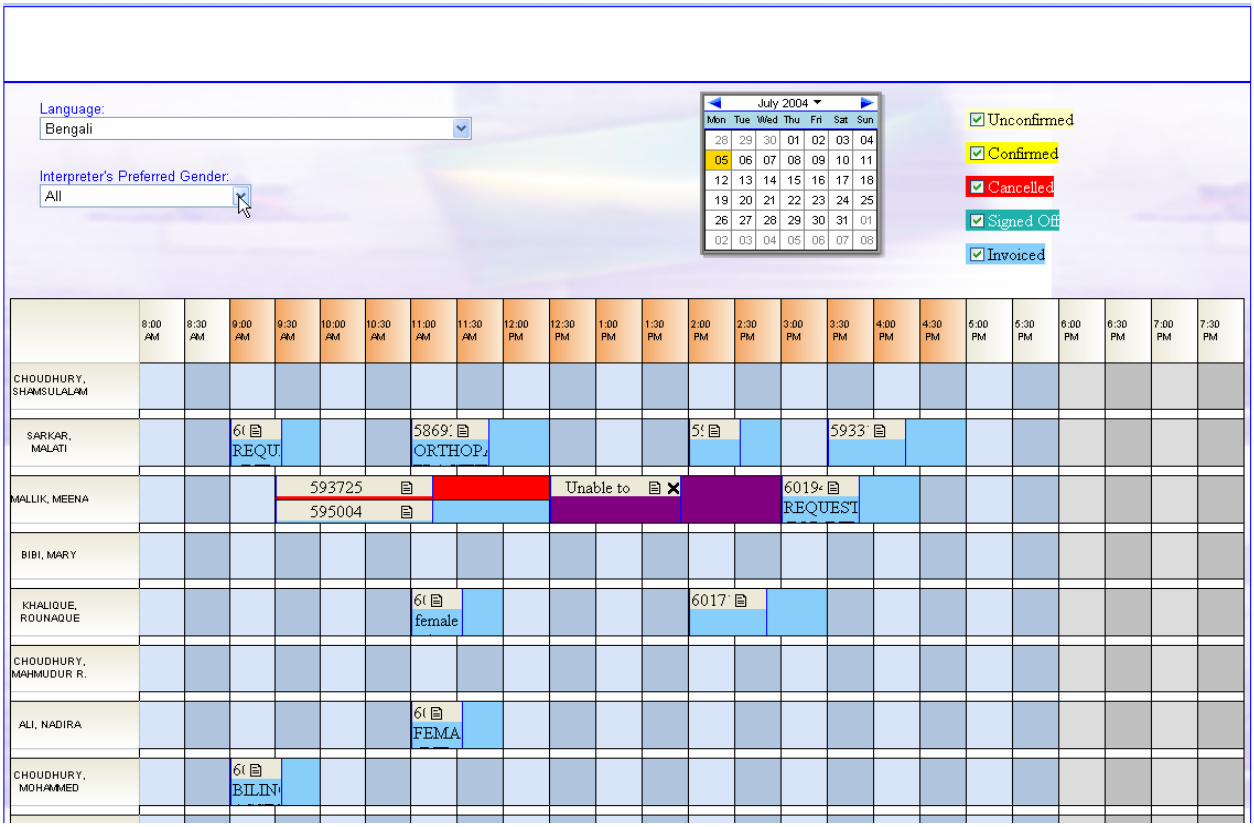
Use the Popup Month/Year selector to navigate to the required Year and Month. After selecting the Month/Year click on the 'OK' or 'Cancel' button.

3.5.3 Selecting the Interpreter's Preferred Gender

This option allows you to selectively view the Male, Female or both gender interpreters.

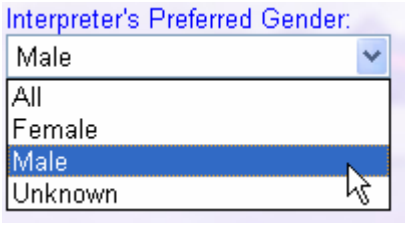
3.5.3.1 All Interpreters

By default the first view that is displayed for All gender interpreters.

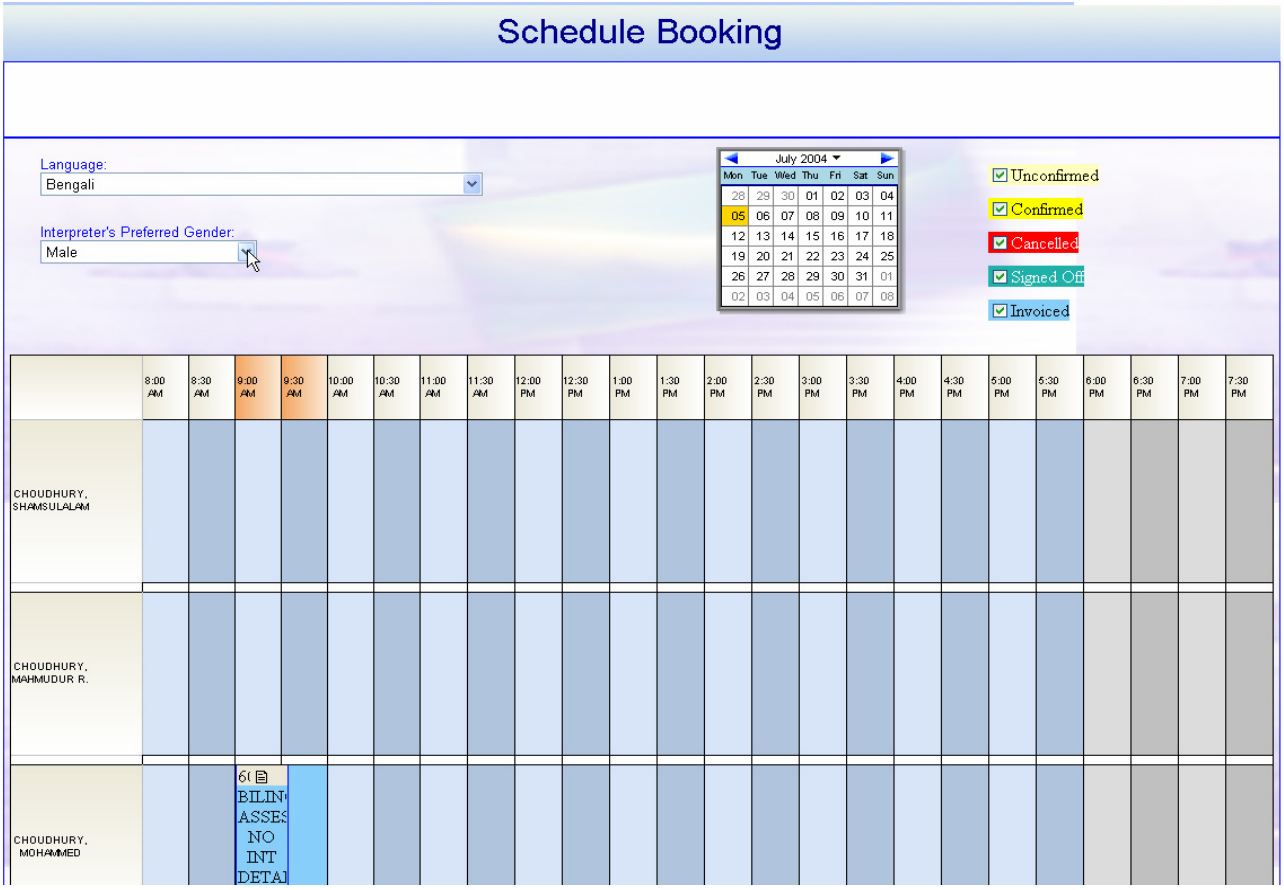


3.5.3.2 Male Interpreters

The Male selection allows you to view the Diary for the ‘Male’ interpreters only.

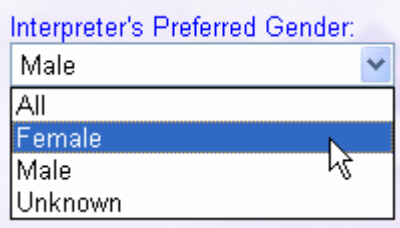


Select the ‘Male’ option as shown above to amend the diary

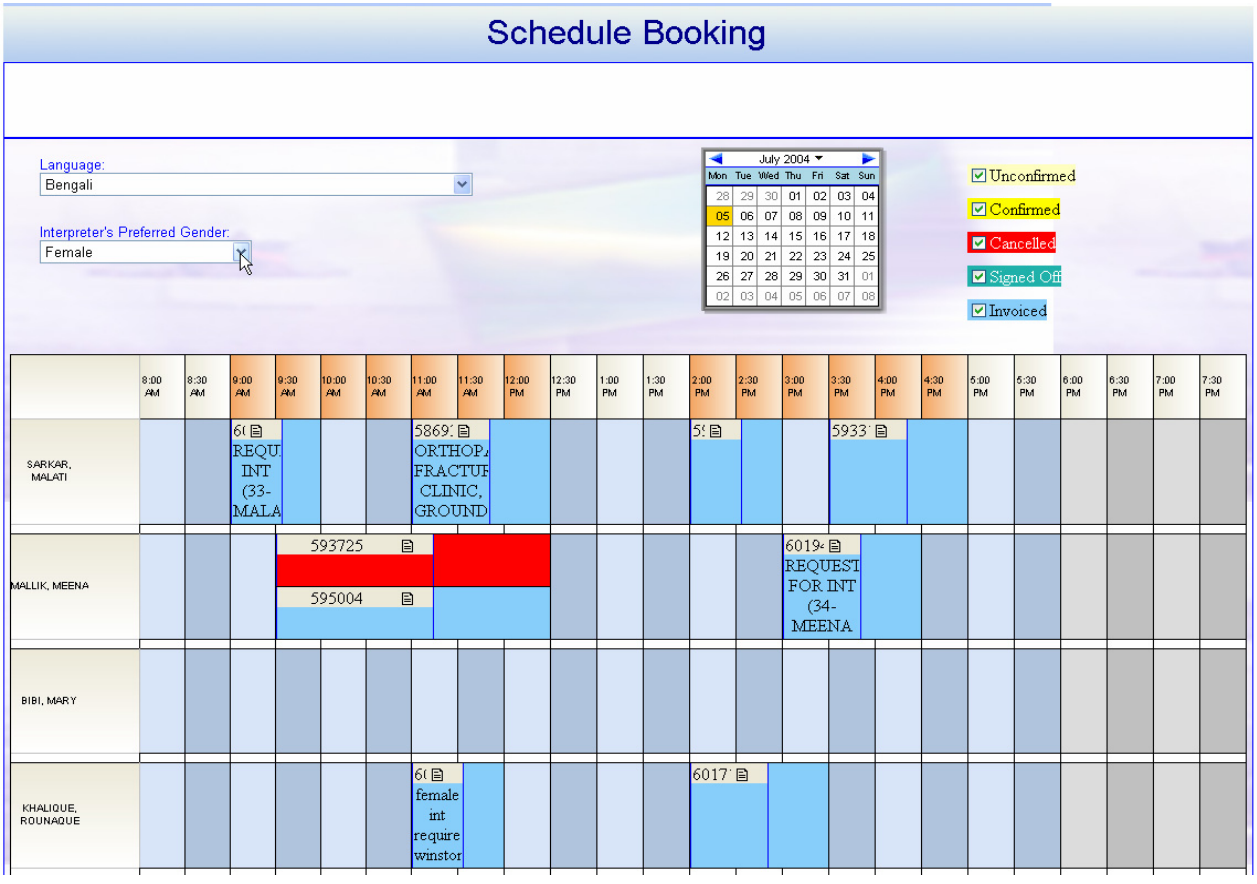


3.5.3.3 Female Interpreters

The Female view allows you to view the Diary for the 'Female' Interpreters only.



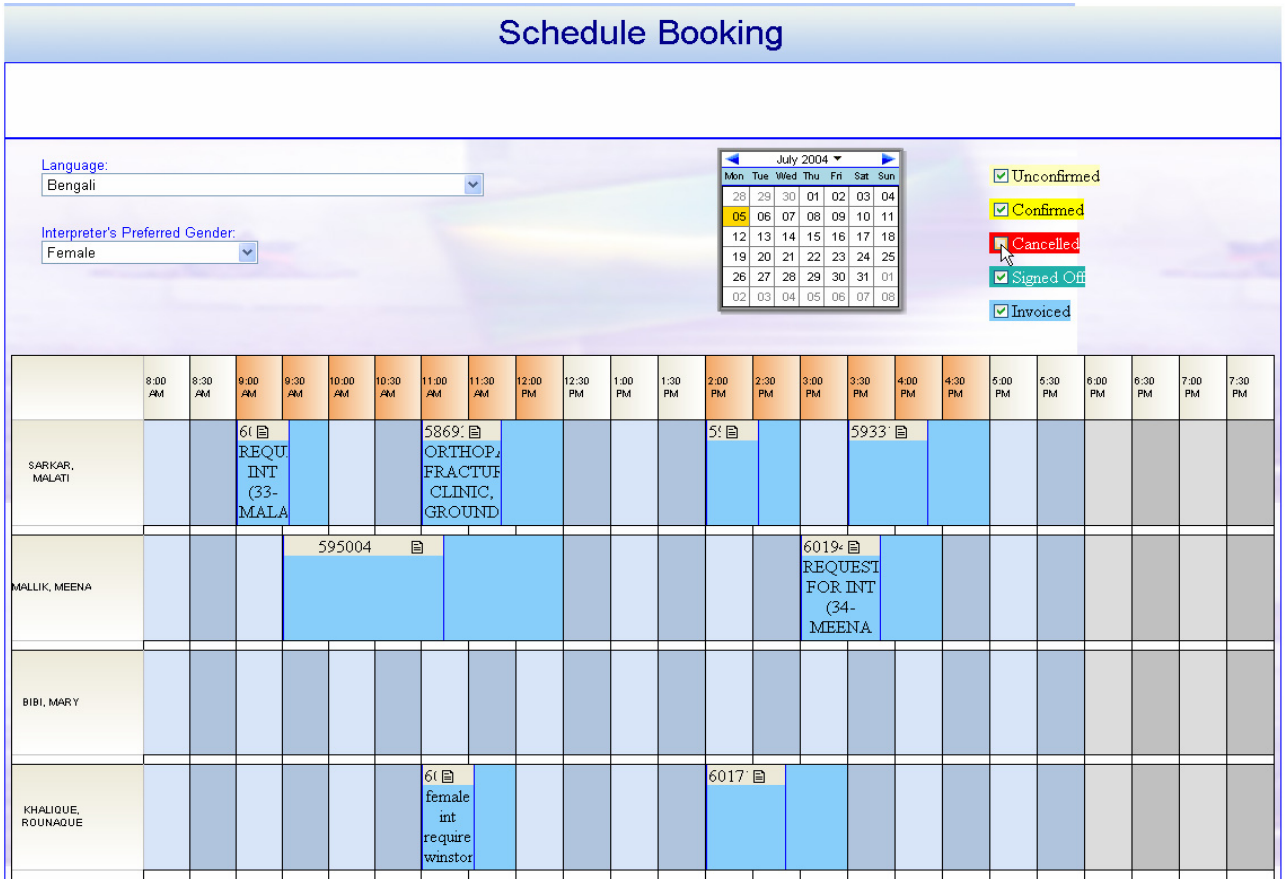
Select the 'Female' option as shown above to amend the diary to.



3.5.4 Viewing Bookings by Status

You can view bookings for the Interpreter by selecting/unselecting the status of the bookings that you need to view:

By default all the Bookings status' are selected. Unselect any booking status that you do not wish to view. This will trigger a refresh and the bookings for the status that was unselected will not be displayed. In the above example all 'Cancelled' bookings have been unselected and are not displayed on the diary after the refresh.



3.5.5 Booking Status Colours

The colour scheme that is used for the status of the bookings is as follows:

Booking Status	Colour
Confirmed	Yellow
Cancelled	Red
Signed-off	Green
Invoiced	Blue

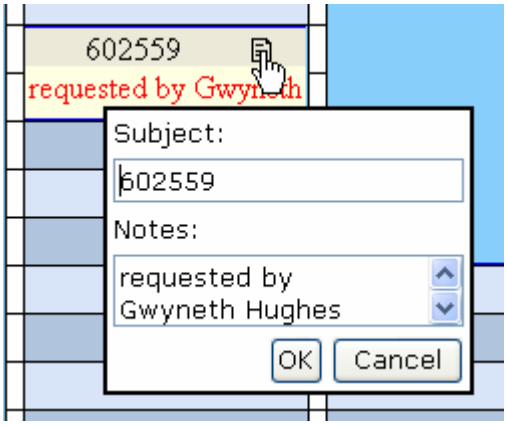
3.5.6 View Booking Notes

You can view the booking notes by using two methods:

(1) Click on the notes icon shown within the booking

(2) Click twice on the booking notes (which may not all be visible). Once to select the booking and the second time to view the notes

Use the OK or Cancel button to close the notes. Bookings cannot be created or edited via the Interpreter's Diary. You can view the details only.



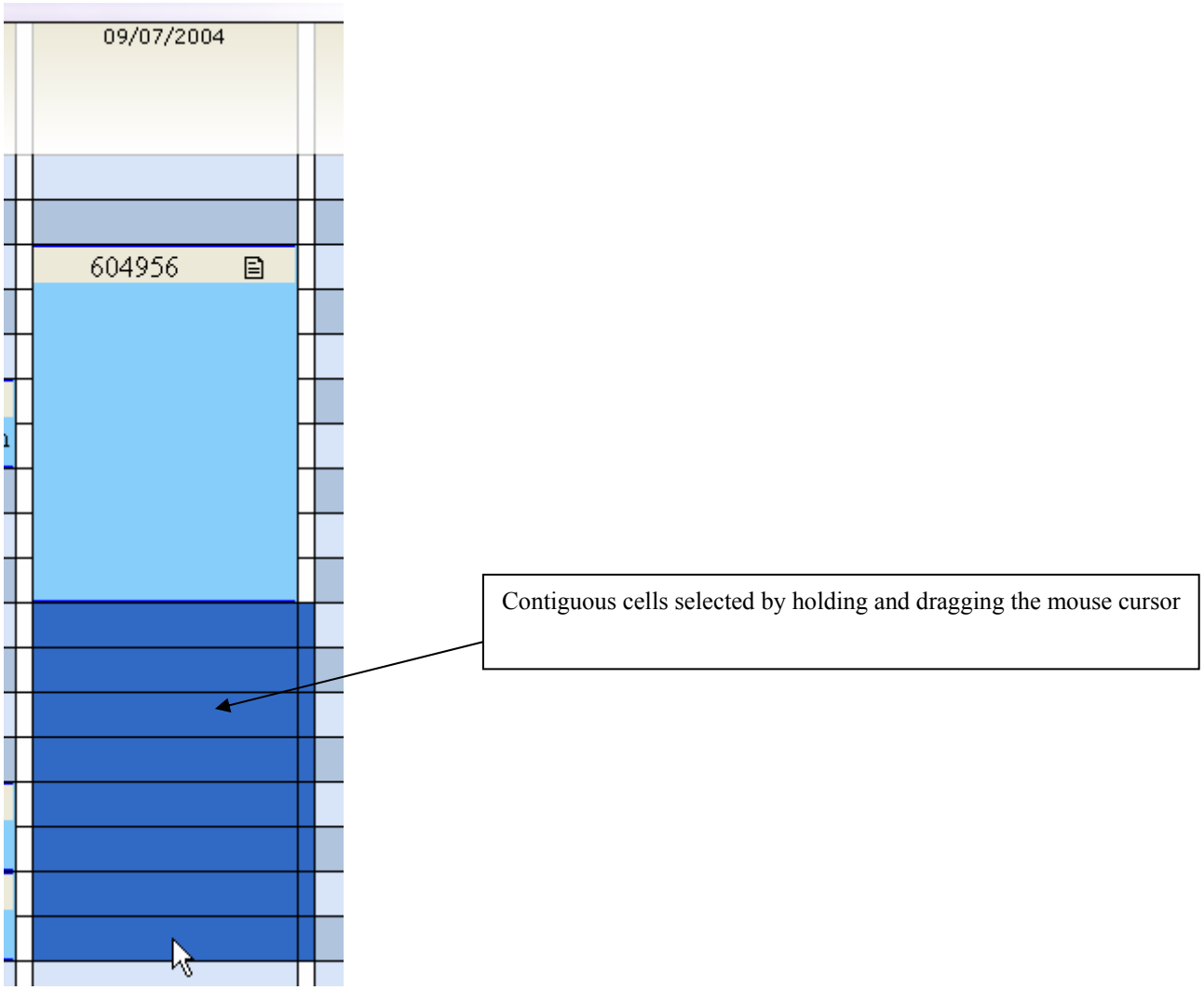
3.5.7 Create a Booking

This function allows you to create a Booking for the criteria you have selected.

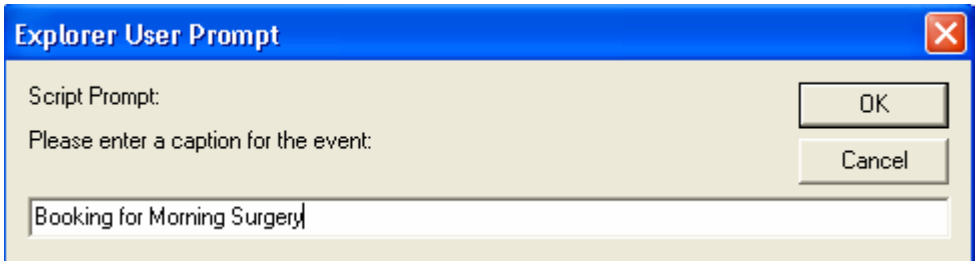
You can create the booking in two ways:

(1) Click on a day cell

(2) Select a contiguous range of day cells

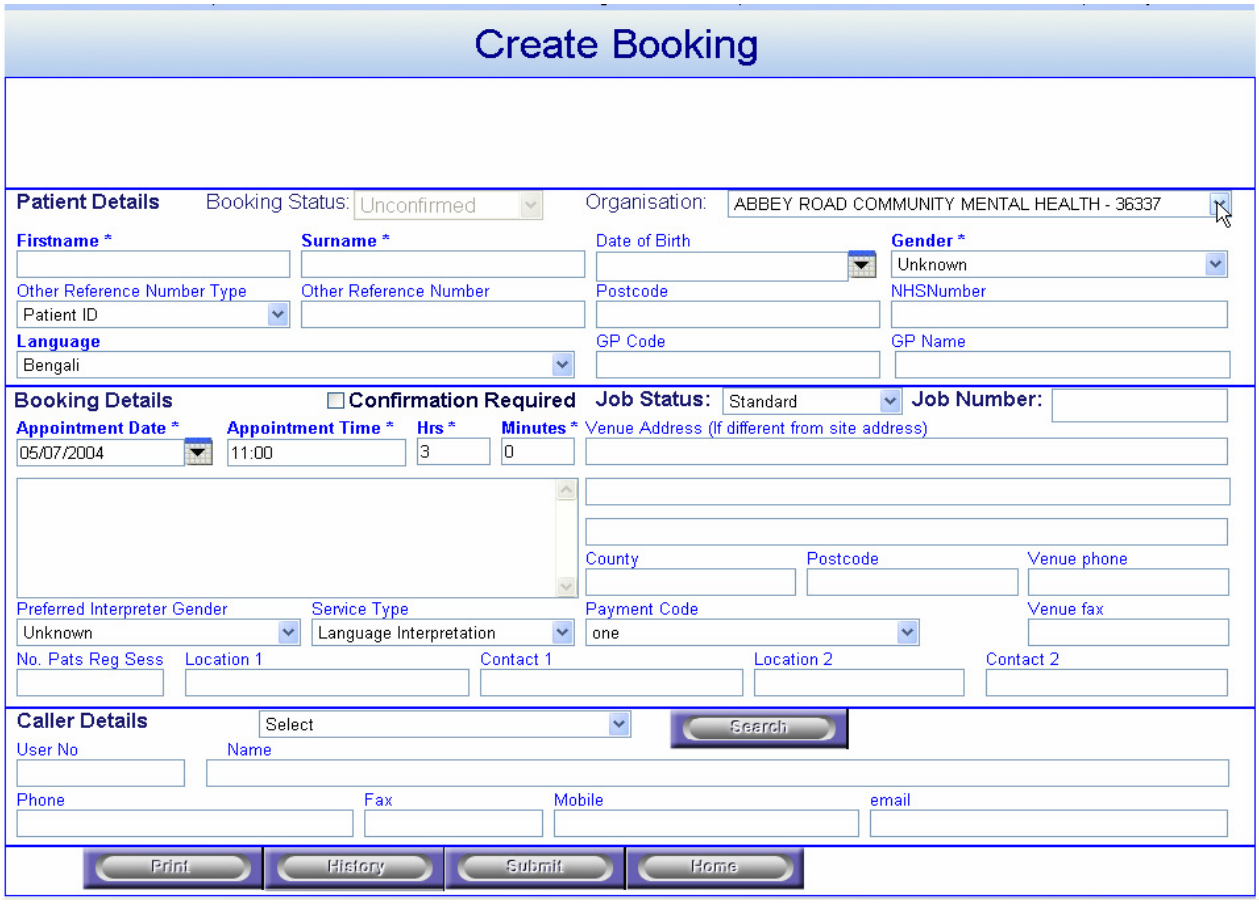


This will display the following prompt so that you can enter the notes relating to the unavailability



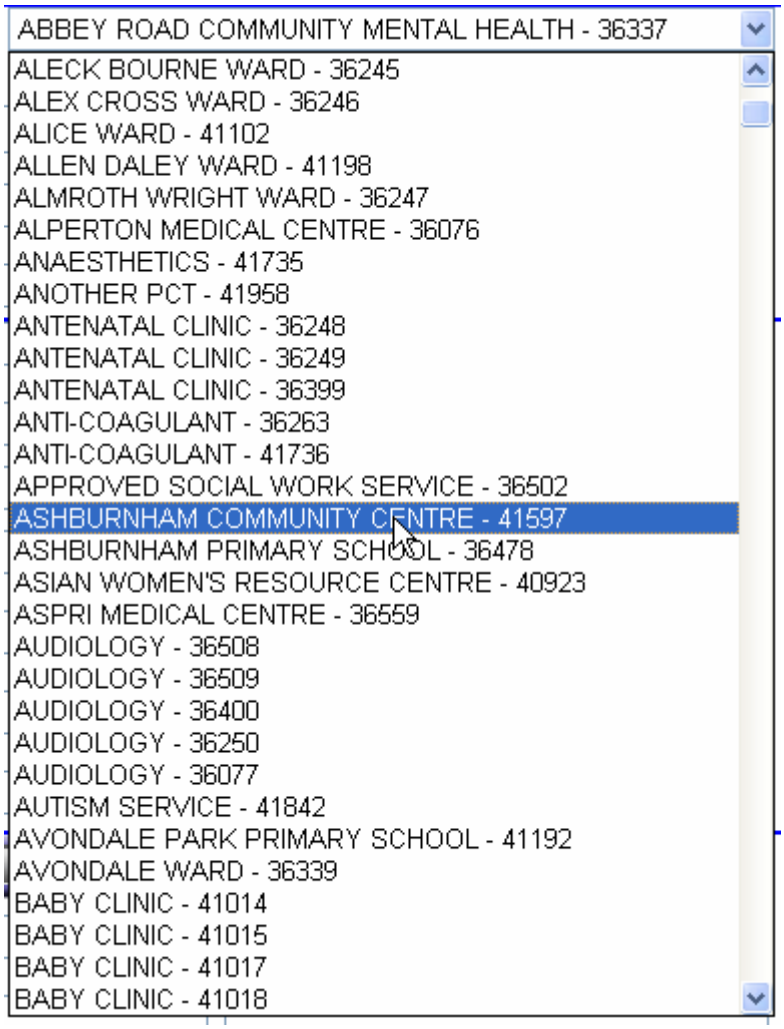
Enter the text and click on the 'OK' button

3.5.8 Create Booking Details



The above screen will be displayed for the selected language Interpreter, Language and Time:

(1) Select the Organisation for the Booking


ABBEY ROAD COMMUNITY MENTAL HEALTH - 36337
ALECK BOURNE WARD - 36245
ALEX CROSS WARD - 36246
ALICE WARD - 41102
ALLEN DALEY WARD - 41198
ALMROTH WRIGHT WARD - 36247
ALPERTON MEDICAL CENTRE - 36076
ANAESTHETICS - 41735
ANOTHER PCT - 41958
ANTENATAL CLINIC - 36248
ANTENATAL CLINIC - 36249
ANTENATAL CLINIC - 36399
ANTI-COAGULANT - 36263
ANTI-COAGULANT - 41736
APPROVED SOCIAL WORK SERVICE - 36502
ASHBURNHAM COMMUNITY CENTRE - 41597
ASHBURNHAM PRIMARY SCHOOL - 36478
ASIAN WOMEN'S RESOURCE CENTRE - 40923
ASPRI MEDICAL CENTRE - 36559
AUDIOLOGY - 36508
AUDIOLOGY - 36509
AUDIOLOGY - 36400
AUDIOLOGY - 36250
AUDIOLOGY - 36077
AUTISM SERVICE - 41842
AVONDALE PARK PRIMARY SCHOOL - 41192
AVONDALE WARD - 36339
BABY CLINIC - 41014
BABY CLINIC - 41015
BABY CLINIC - 41017
BABY CLINIC - 41018

(2) Enter the First name and Surname of the patient

(3) Amend the Notes and enter other details of the patient

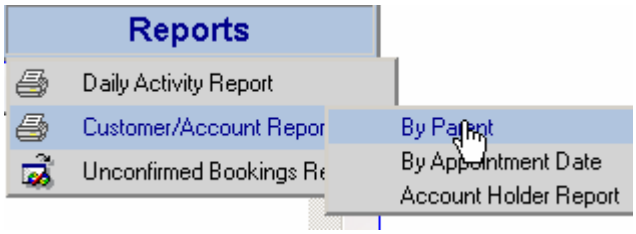
(4) Click on the 'Submit' button to save the booking

Reports

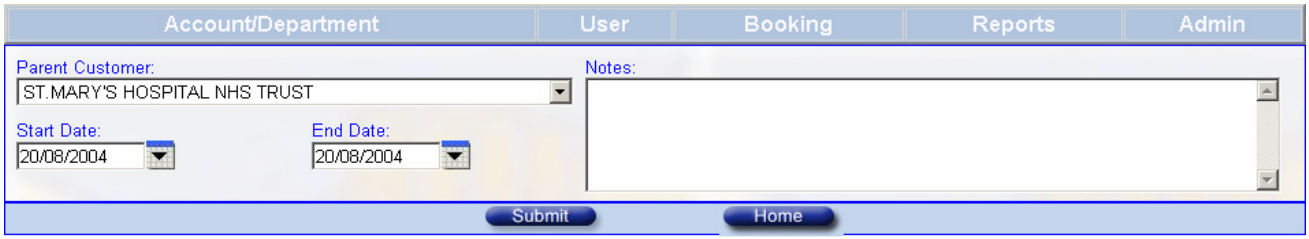
This section describes the Reports that are available to Customer Administrators.

3.5.9 Customer Account Reports

3.5.9.1 By Parent



This report lists all the bookings entered on a particular day by a Customer. The list is by Account Holder and shows all the department's bookings for the account holder.



Enter the start and end date for the report and select the Account Holder. Add any notes required for the Report

Printed Date: August 23, 2004

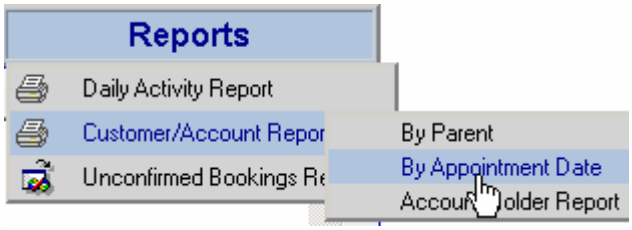
Daily Activity Report

ST.MARY'S HOSPITAL NHS TRUST

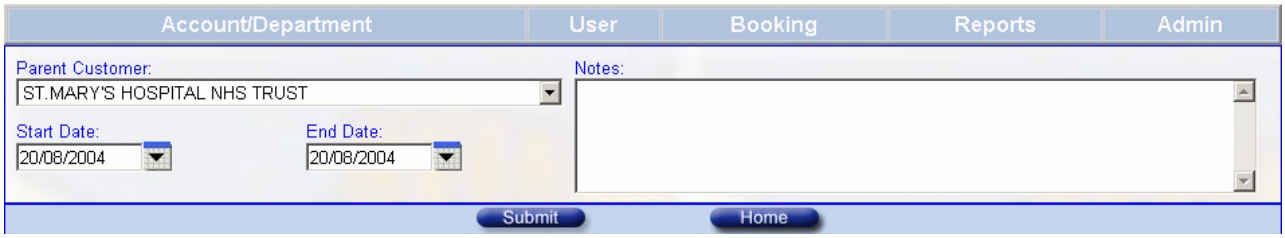
Book Date	Booking_ID	Appt. Date	Appt. Time	Pat. Ref.	Pat. Name	Language	Interpreter	
August 20, 2004								
Confirmed								
20-Aug-2004	607729	05-Oct-2004	10:30 am	3261566	FIDAA FLEIFEL	Arabic	SAYDA EL-SHARIEF	951
20-Aug-2004	607798	22-Sep-2004	12:20 pm	3331825	HANAN SALIM	Arabic	MOHAMMED BABIKER	898
20-Aug-2004	607803	18-Nov-2004	11:15 am	3156410	RAHAB ALHADI	Arabic	MOHAMMED BABIKER	898
20-Aug-2004	607794	09-Sep-2004	10:40 am	3320050	EMIL AZIZ	Arabic	MOHAMMED BABIKER	898
20-Aug-2004	607783	24-Aug-2004	4:00 pm	MJ111195	CONFIDENTIAL CONFIDENTIAL	Spanish	GUILLERMO ARROYAVE	869
20-Aug-2004	607726	15-Nov-2004	11:15 am	M048000	MOHAMMED GARDALLA	Arabic	SAYDA EL-SHARIEF	951
20-Aug-2004	607795	13-Sep-2004	12:15 pm	3244416	ALI MOHAMMED	Kurdish	FADIL SAMAN	926
20-Aug-2004	607737	23-Aug-2004	10:30 am	3377260	ALIA KINKON	Arabic	AMIN BABIKIR	964
20-Aug-2004	607800	14-Oct-2004	1:45 pm	3306417	AMJAD AL-SAIQ	Arabic	MOHAMMED BABIKER	898
20-Aug-2004	607732	23-Aug-2004	3:00 pm	F111705	CONFIDENTIAL, CONFIDENTIAL	Bengali	NADIRA ALI	963
20-Aug-2004	607802	11-Nov-2004	11:15 am	M204208	SHOUI CHENOG	Cantonese	TAMMY TOMS	9232
20-Aug-2004	607814	04-Aug-2004	4:30 pm	F110854	CONFIDENTIAL CONFIDENTIAL	Thai	RASME TOMEI NAKORNSUWAN	872
20-Aug-2004	607739	19-Aug-2004	9:20 am	F112257	CONFIDENTIAL CONFIDENTAIL	Russian	LUDMILA IGNATJEVA	969
20-Aug-2004	607790	02-Sep-2004	11:20 am	F110904	CONFIDENTIAL CONFIDENTIAL	Spanish	RHONA P. DESMOND	907
20-Aug-2004	607799	23-Sep-2004	4:00 pm	MJ109190	CONFIDENTIAL CONFIDENTIAL	Arabic	MOHAMMED BABIKER	898
Unconfirmed								
20-Aug-2004	607807	25-Aug-2004	9:45 am	3392440	ZEINAB AHMEN ALI	Arabic		
20-Aug-2004	607784	24-Aug-2004	10:00 am	3158158	ADNAN ABDULWAED	Arabic		
20-Aug-2004	607785	25-Aug-2004	3:20 pm	F111937	CONFIDENTIAL CONFIDENTIAL	Thai		

Example of report is shown above

3.5.9.2 By Appointment Date



This report lists all bookings by Status.



Enter the Start and End Appointment dates for the report and select the Account Holder:

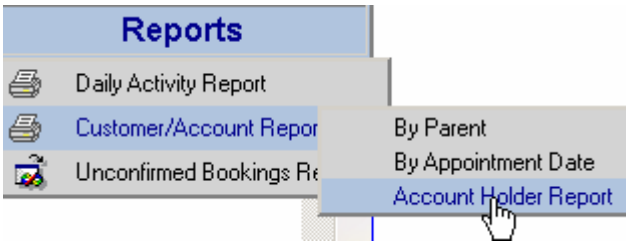
Daily Activity Report

ST.MARY'S HOSPITAL NHS TRUST

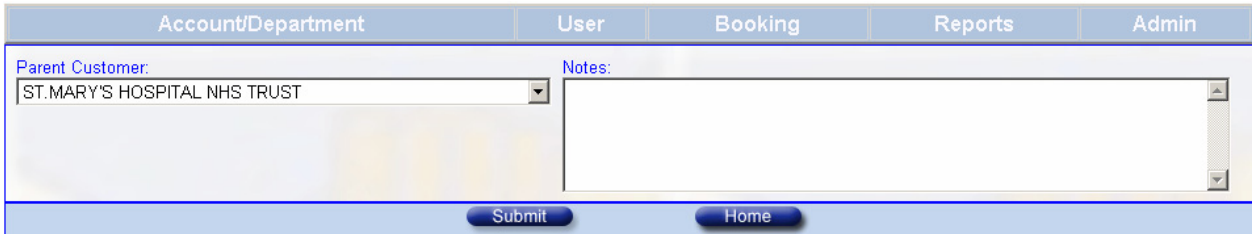
Book Date	Booking_ID	Appt. Date	Appt. Time	Pat. Ref.	Pat. Name	Language	Interpreter	
20/08/2004								
Cancelled								
31-Mar-2004	592533	20-Aug-2004	11:00 am	1152917	SOLTAN SALAHI	Farsi	GHULAM RABANI ADEL	974
19-Jul-2004	604086	20-Aug-2004	9:15 am	3000236	ANTISAR AZIZ	Arabic	SAYDA EL-SHARIEF	951
29-Jul-2004	605546	20-Aug-2004	10:30 am	M241754	KHIRIA HUSSAIN	Arabic	MOHAMMED MERGHANI	879
2-Aug-2004	605903	20-Aug-2004	9:30 am	F111594	CONFIDENTIAL CONFIDENTIAL	Russian	LUDMILA IGNATJEVA	969
3-Aug-2004	606081	20-Aug-2004	2:30 pm	3368213	MONA HASANAIN	Arabic		
3-Aug-2004	606093	20-Aug-2004	2:30 pm	3368213	MONA HASANAIN	Arabic		
3-Aug-2004	606105	20-Aug-2004	2:30 pm	3368213	MONA HASANAIN	Arabic		
3-Aug-2004	606117	20-Aug-2004	2:30 pm	3368213	MONA HASANAIN	Arabic		
3-Aug-2004	606132	20-Aug-2004	2:30 pm	3368213	MONA HASANAIN	Arabic		
13-Aug-2004	607046	20-Aug-2004	10:30 am	M241754	KHIRIA HUSSAIN	Arabic		
Confirmed								
10-May-2004	597007	20-Aug-2004	2:10 pm	3341135	BERTHE ZIZA	Arabic	NAFISA EL-SHALLALY	905
9-Jun-2004	600238	20-Aug-2004	9:30 am	4174884	ANWAR BEGUM	Bengali	MEENA MALLIK	844
10-Jun-2004	600375	20-Aug-2004	10:20 am	3266120	AHMED KHALID FARAJ ALJAF	Arabic	MOHAMMED BABIKER	898
15-Jun-2004	600729	20-Aug-2004	11:00 am	M240115	RACHIDA BENKICEM	Arabic	MAGDALENE BURROWS	1009
25-Jun-2004	601888	20-Aug-2004	10:00 am	3172068	SAZID ALI	Bengali	SHAMSULALAM CHOUDHURY	842
2-Jul-2004	602674	20-Aug-2004	10:30 am	M241754	KHIRIA HUSSAIN	Arabic	SAYDA EL-SHARIEF	951
2-Jul-2004	602588	20-Aug-2004	3:30 pm	418 1317	FUNG LEUNG	Cantonese	WAI LING FUNG	845
8-Jul-2004	603219	20-Aug-2004	9:45 am	3129336	JOSE PEREIRA	Portuguese	MARIA C. R. DALRYMPLE	852
16-Jul-2004	603953	20-Aug-2004	9:45 am	3362128	NEMATUALLAH FARAJEE	Farsi	ALI HAJIGHASEM	867

Example of report is shown above

3.5.9.3 Account Holder Report



This report lists all the departments for a particular Account Holder including the Address, Phone numbers and fax numbers.



Select the Account Holder and click on the ‘Submit’ button

Account Holders

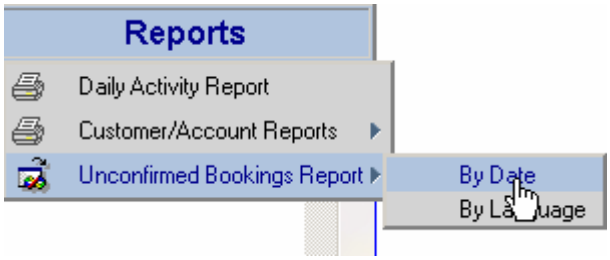
Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

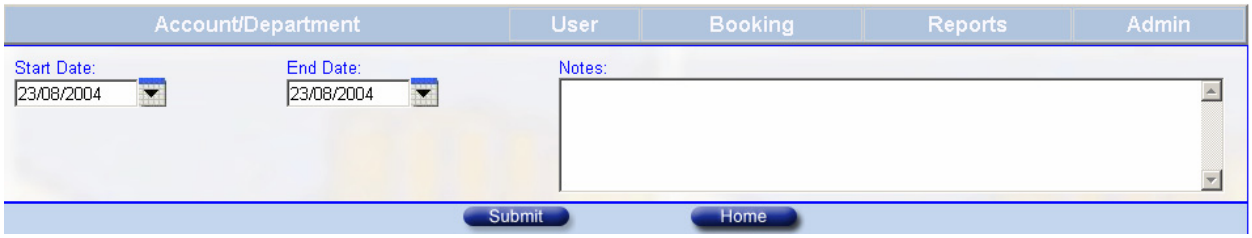
Name	Address	Phone/Fax
ST.MARY'S HOSPITAL NHS TRUST		
ACCIDENT & EMERGENCY Account No: 651	ST.MARY'S HOSPITAL PRAED STREET LONDON W2 1NY	020 7886 6666 020 7886 1211
ALBERT WARD Account No: 653	ST.MARY'S HOSPITAL LONDON W2 1NY	020 7886 6666
P.I.C.U Account No: 1308	ST.MARY'S HOSPITAL LONDON W2 1NY	020 7886 2136 020 7886 1753
ALECK BOURNE WARD Account No: 656	ST.MARY'S HOSPITAL LONDON W2 1NY	020 7886 1146
ALEX CROSS WARD Account No: 655	WESTERN EYE HOSPITAL MARYLEBONE ROAD LONDON NW1	020 78863227/8
ALMROTH WRIGHT WARD Account No: 657	ST.MARY'S HOSPITAL PRAED STREET LONDON W2 1NY	020 7886 1175 020 7886 6991

Sample report is shown above

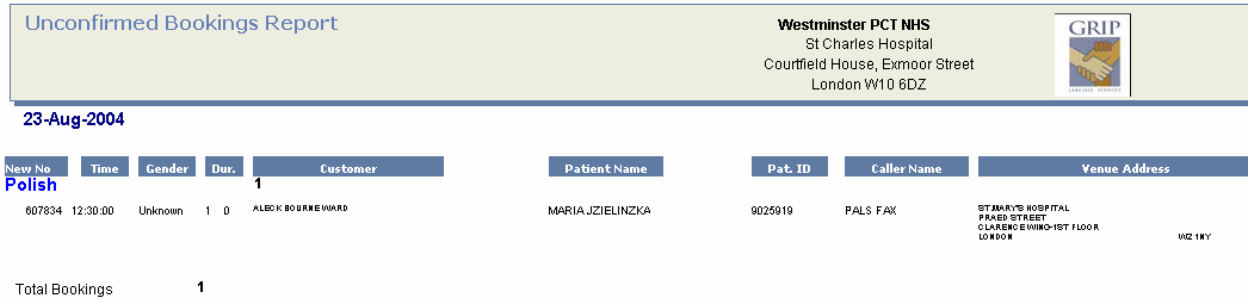
3.5.10 Unconfirmed Bookings Report

3.5.10.1 By Date



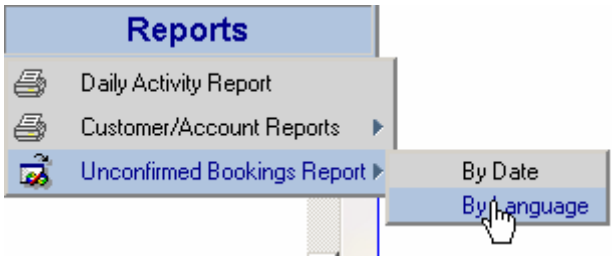


Enter the start and end dates for the report

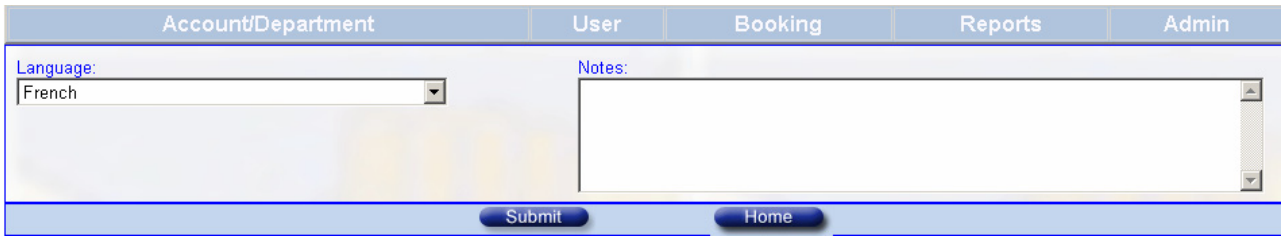


Sample Report shown above

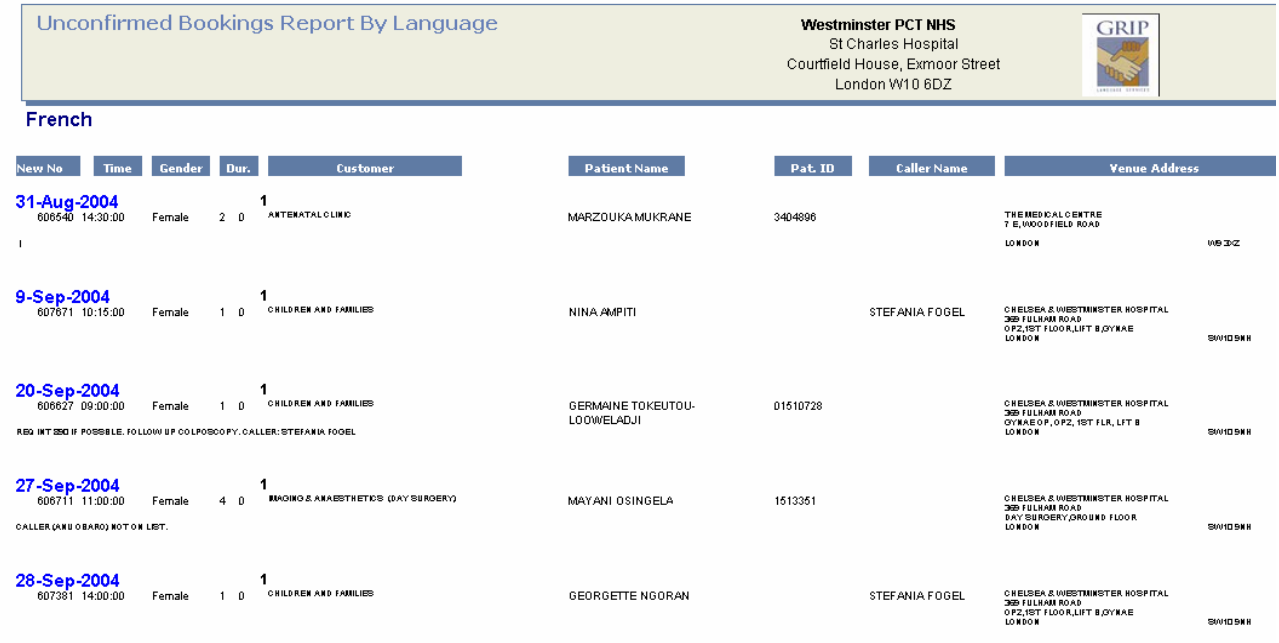
3.5.10.2 By Language



This report show unconfirmed bookings by language. This can be useful for Interpreters



Select the Language and click on ‘Submit’ to create the report



Unconfirmed Bookings Report By Language

Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

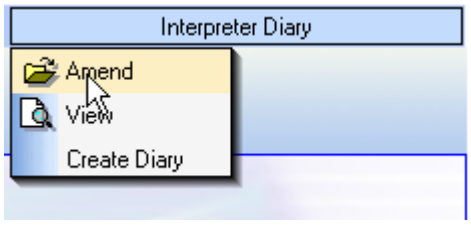
GRIP

French

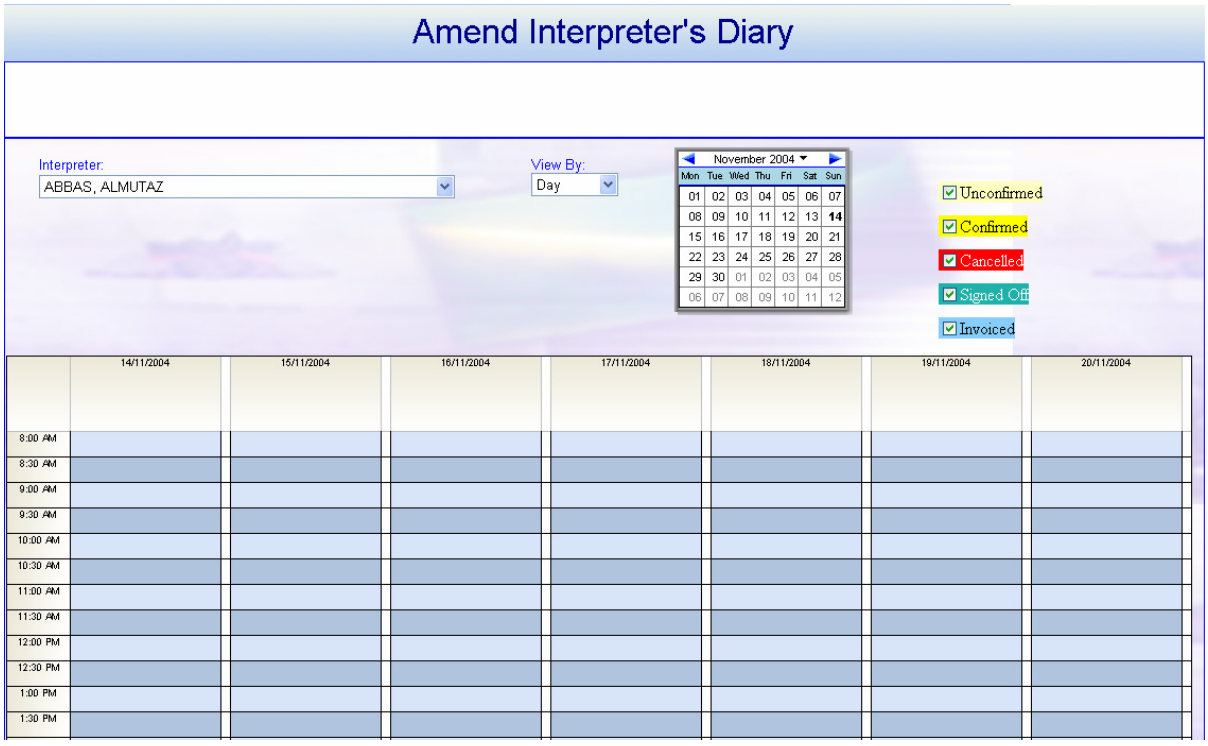
New No	Time	Gender	Dur.		Customer	Patient Name	Pat. ID	Caller Name	Venue Address
31-Aug-2004									
606540	14:30:00	Female	2	0	1 ANTENATAL CLINIC	MARZOUKA MUKRANE	3404896		THE MEDICAL CENTRE 7 E, WOODFIELD ROAD LONDON W9 2HZ
I									
9-Sep-2004									
607671	10:15:00	Female	1	0	1 CHILDREN AND FAMILIES	NINA AMPITI		STEFANIA FOGEL	CHELSEA & WESTMINSTER HOSPITAL 369 FULHAM ROAD OPZ,1ST FLOOR,LIFT B,GYNAE LONDON SW10 9NH
20-Sep-2004									
606627	09:00:00	Female	1	0	1 CHILDREN AND FAMILIES	GERMAINE TOKEUTOU-LOOWELADJI	01510728		CHELSEA & WESTMINSTER HOSPITAL 369 FULHAM ROAD GYNAE OP, OPZ, 1ST FLR, LFT B LONDON SW10 9NH
REQ INT SBO IF POSSIBLE. FOLLOW UP COLPOSCOPY. CALLER: STEFANIA FOGEL									
27-Sep-2004									
606711	11:00:00	Female	4	0	1 IMAGING & ANAESTHETICS (DAY SURGERY)	MAYANI OSINGELA	1513351		CHELSEA & WESTMINSTER HOSPITAL 369 FULHAM ROAD DAY SURGERY,GROUND FLOOR LONDON SW10 9NH
CALLER (ANU OBARO) NOT ON LIST.									
28-Sep-2004									
607381	14:00:00	Female	1	0	1 CHILDREN AND FAMILIES	GEORGETTE NGORAN		STEFANIA FOGEL	CHELSEA & WESTMINSTER HOSPITAL 369 FULHAM ROAD OPZ,1ST FLOOR,LIFT B,GYNAE LONDON SW10 9NH

3.6 Amend Interpreter Diary

The Interpreter's diary can be accessed via the main menu option as follows:



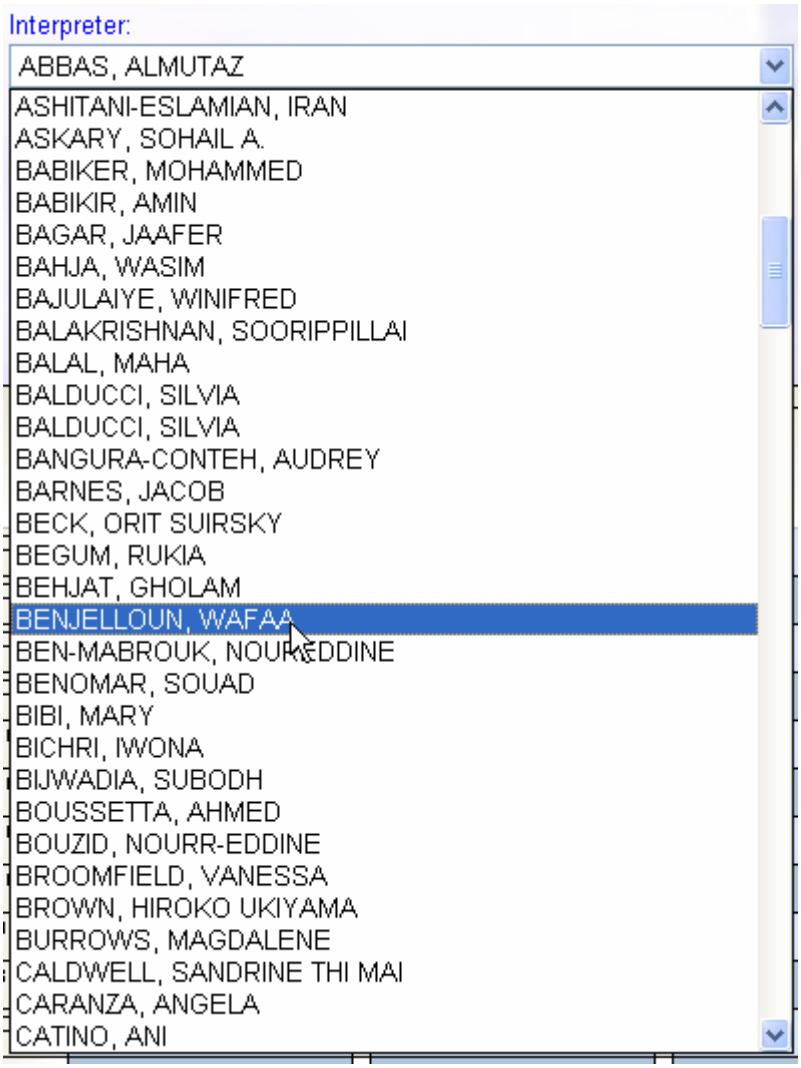
Click on the 'Amend' option to enter the Interpreter's Diary



The above screen shows the default display for the Interpreter's diary.

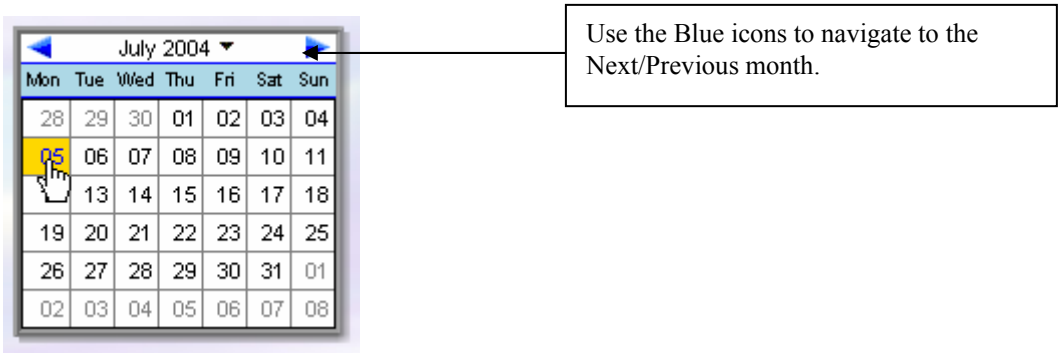
3.6.1 Selecting the Interpreter

Select the name of the Interpreter whose diary needs to be amended. On selecting the interpreter, the screen will default to the Interpreter's diary for today.

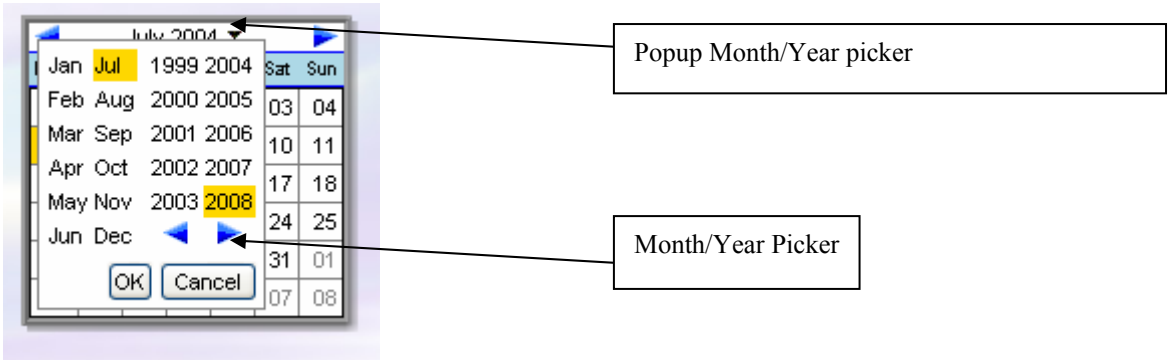


3.6.2 Selecting the Date

Use the Calendar to select the date that you need for viewing the Interpreter's diary:



Use the Next/Previous Month picker to view dates for different months of the year. Click on the Day that you want to start viewing the Calendar. In the example above the diary will start on the 5th July 2004.

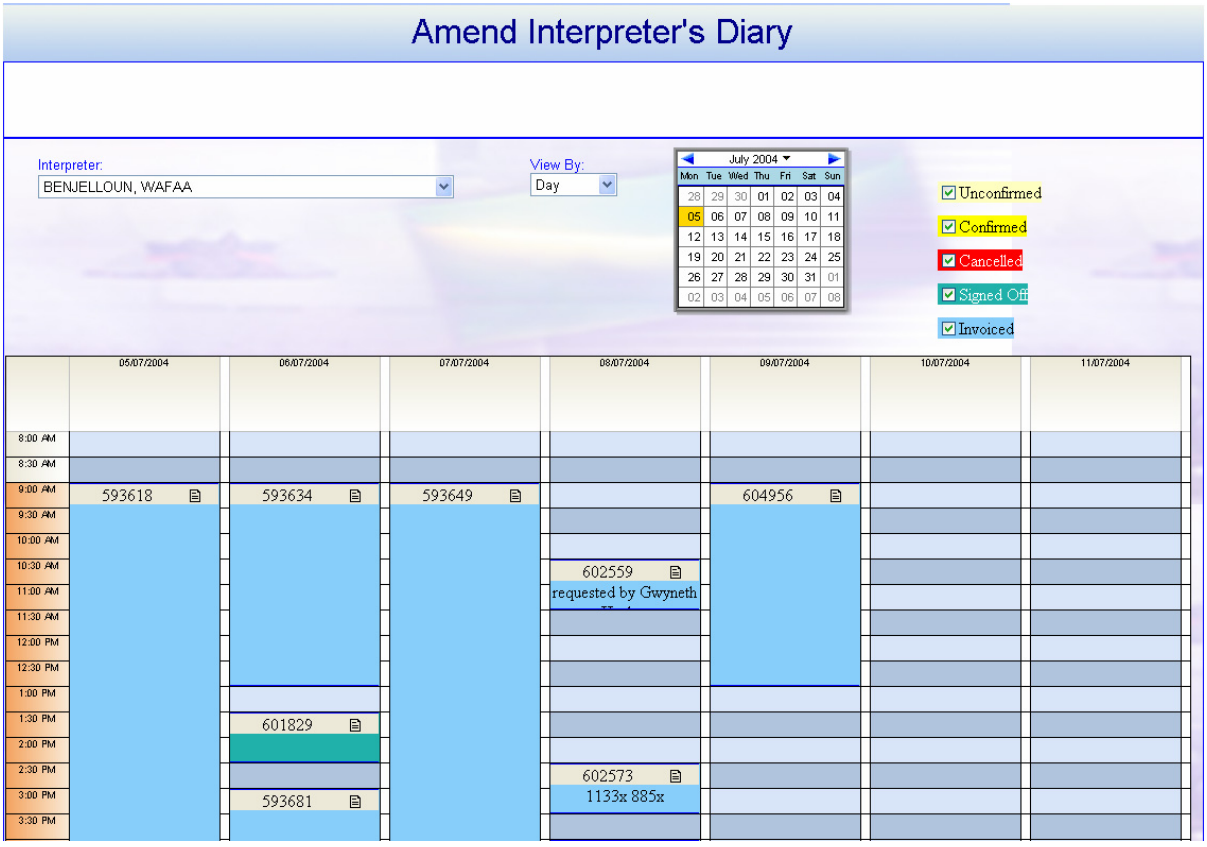


Use the Popup Month/Year selector to navigate to the required Year and Month. After selecting the Month/Year click on the 'OK' or 'Cancel' button.

3.6.3 Selecting Day/Week/Month Views

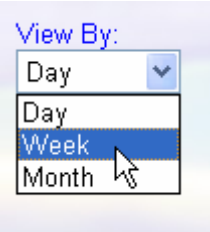
3.6.3.1 Day View

By default the first view that is displayed is the Day view. This shows 7 days starting from today's date. If another date is selected from the Calendar, then the view will show the next seven days starting from the selected date.

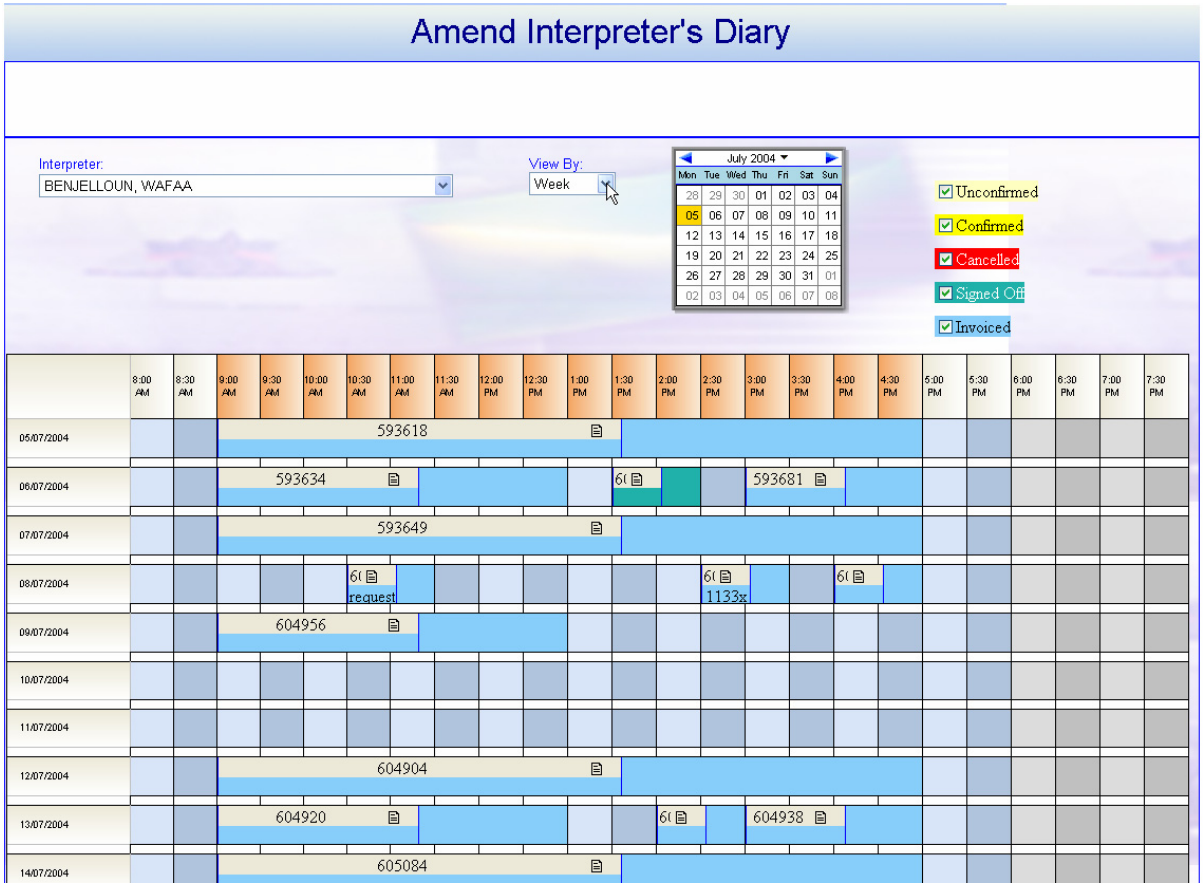


3.6.3.2 Week View

The Week view allows you to view the Diary for the next two weeks.



Select the ‘Week’ option as shown above to amend the diary to ‘Week’ View

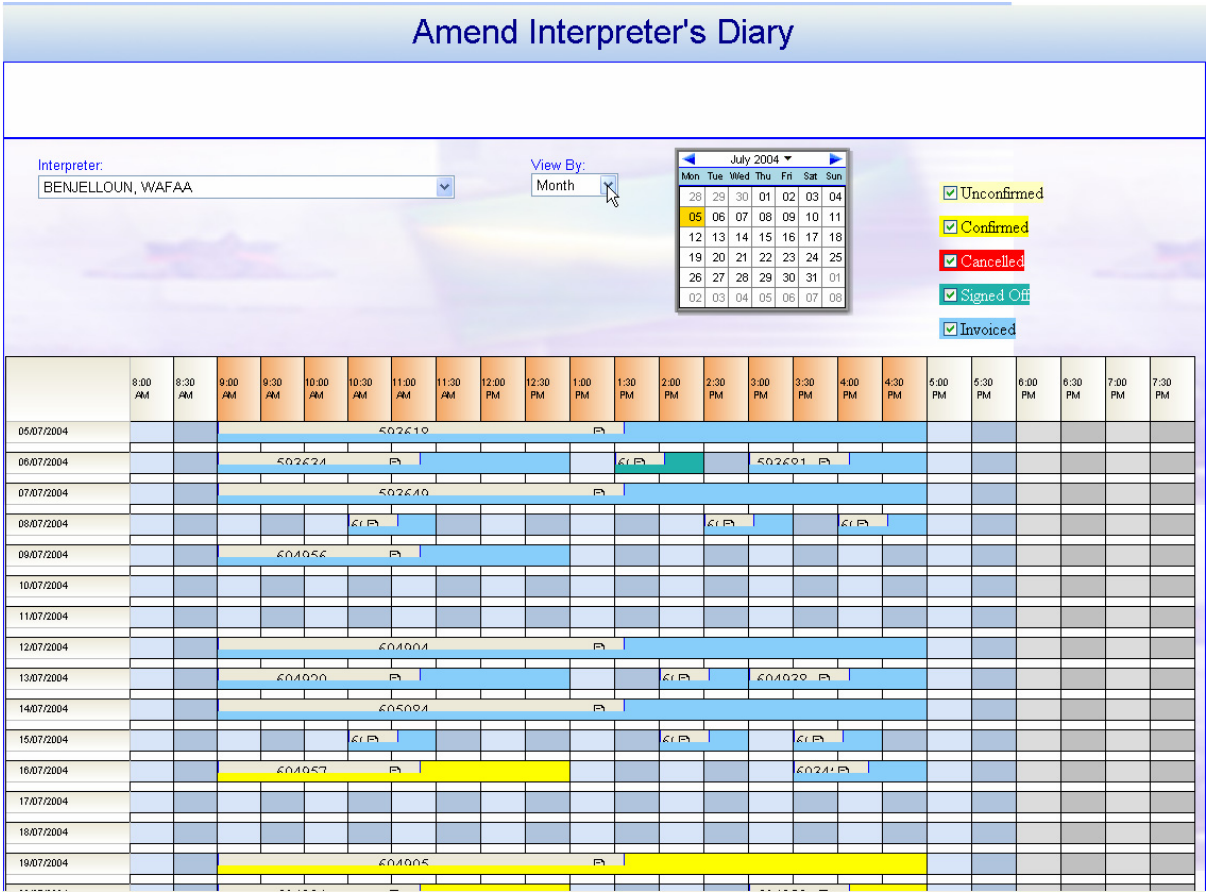


In the ‘Week’ view the dates are shown on the side and the time on the Top of the view.

3.6.3.3 Month View

The Month view allows you to view the Diary for the next month starting from the selected date.

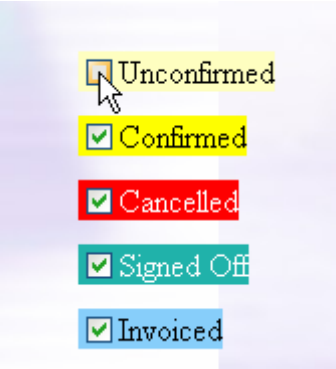
Select the 'Month' option as shown above to amend the diary to 'Month' View



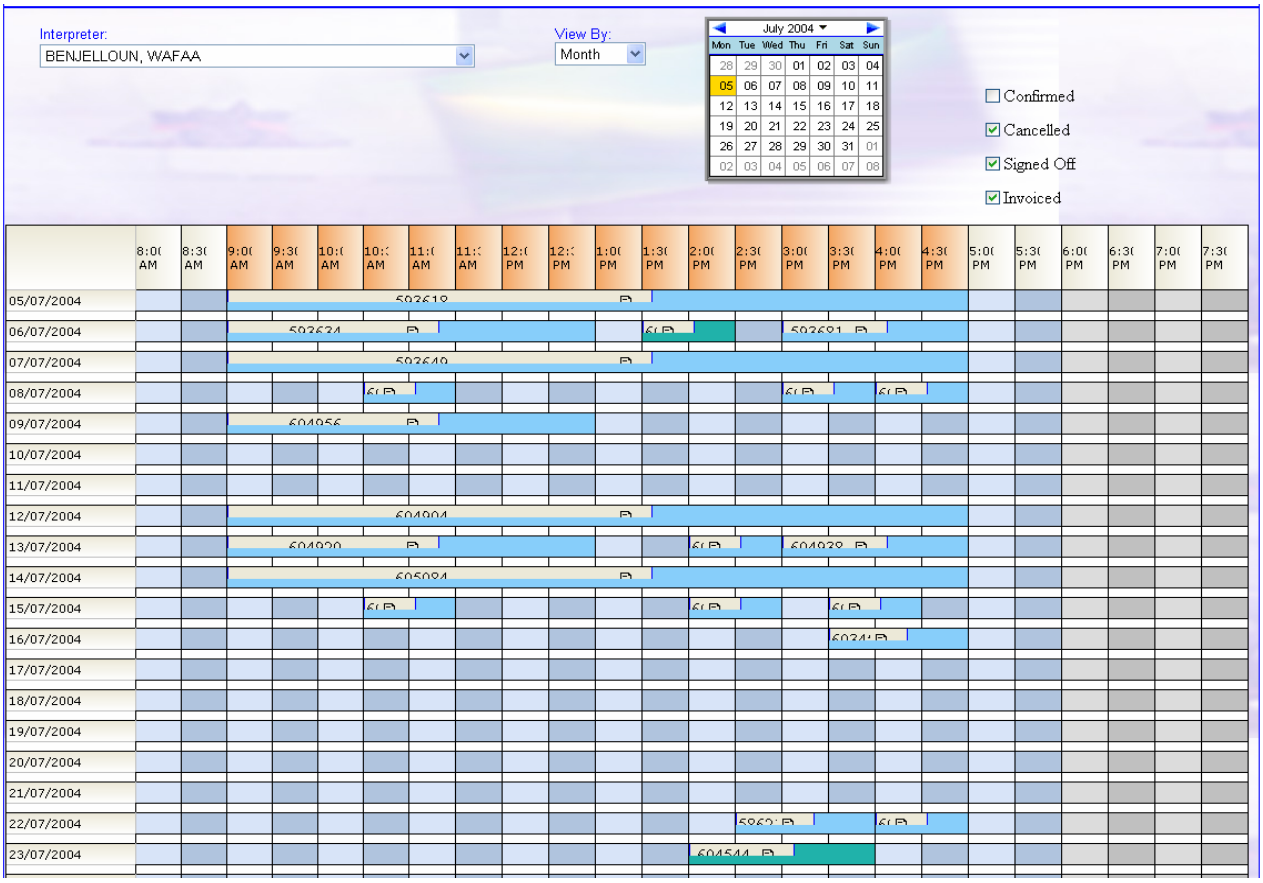
The month view, similar to the Week view shows the dates at the side of the display and the time at the top of the display.

3.6.4 Viewing Bookings by Status

You can view bookings for the Interpreter by selecting/unselecting the status of the bookings that you need to view:



By default all the Bookings status' are selected. Unselect any booking status that you do not wish to view. This will trigger a refresh and the bookings for the status that was unselected will not be displayed. In the above example all 'Confirmed' bookings have been unselected and are not displayed on the diary after the refresh.



3.6.5 Booking Status Colours

The colour scheme that is used for the status of the bookings is as follows:

Booking Status	Colour
Confirmed	Yellow
Cancelled	Red
Signed-off	Green
Invoiced	Blue

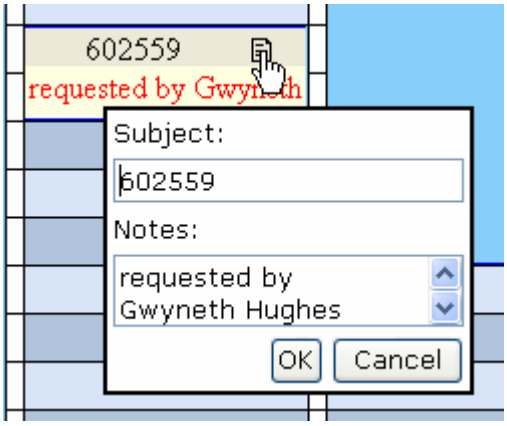
3.6.6 View Booking Notes

You can view the booking notes by using two methods:

(3) Click on the notes icon shown within the booking

(4) Click twice on the booking notes (which may not all be visible). Once to select the booking and the second time to view the notes

Use the OK or Cancel button to close the notes. Bookings cannot be created or edited via the Interpreter's Diary. You can view the details only.



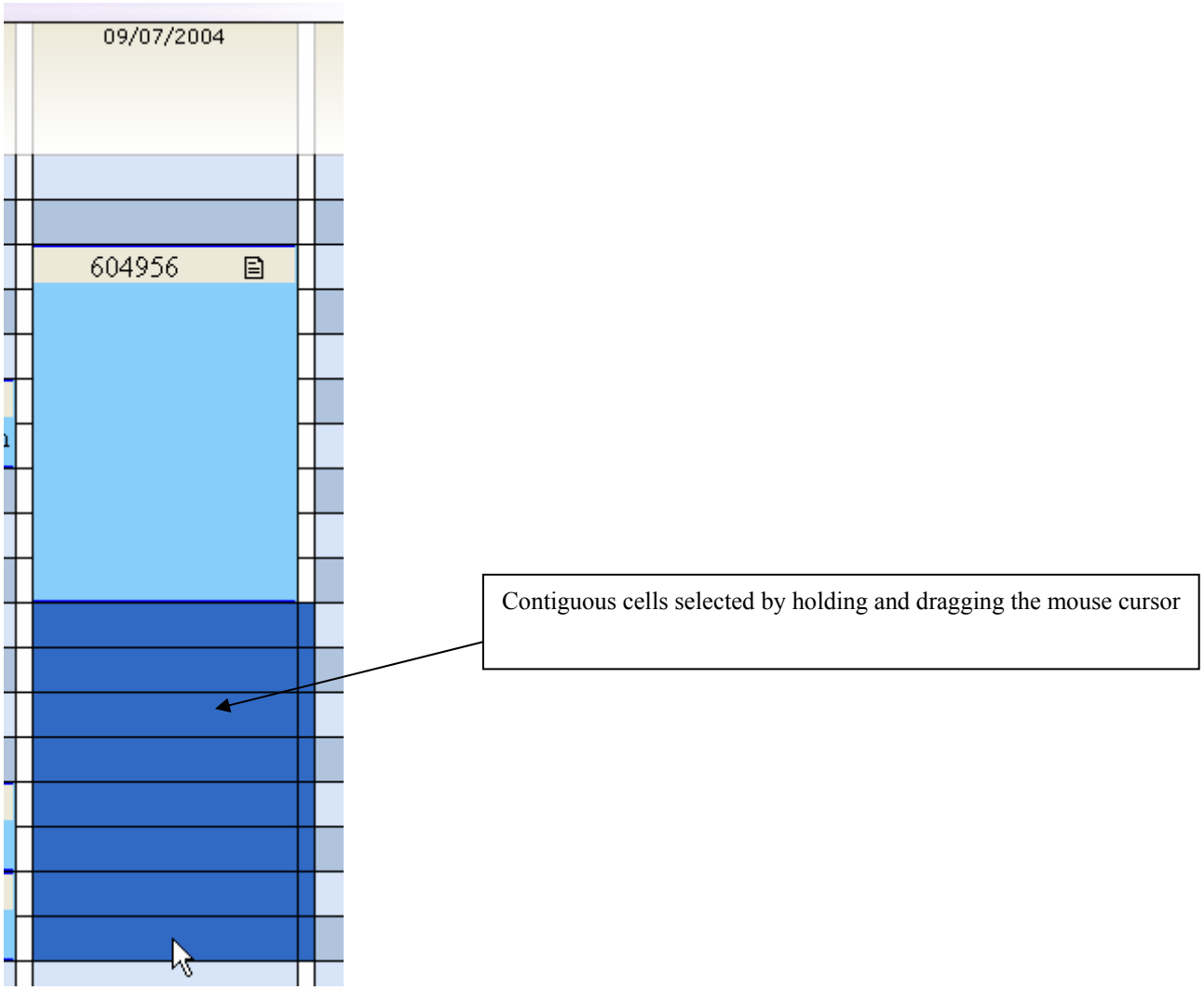
3.6.7 Enter Interpreter 'Unavailability'

This function allows you to enter the times when the interpreter is not available on a particular day.

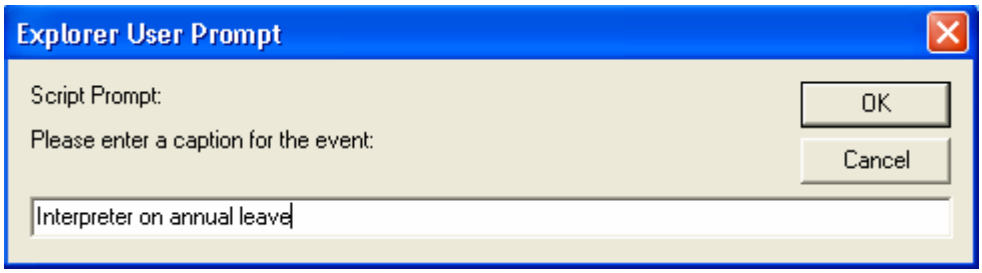
You can create the unavailability block in two ways:

(3) Click on a day cell

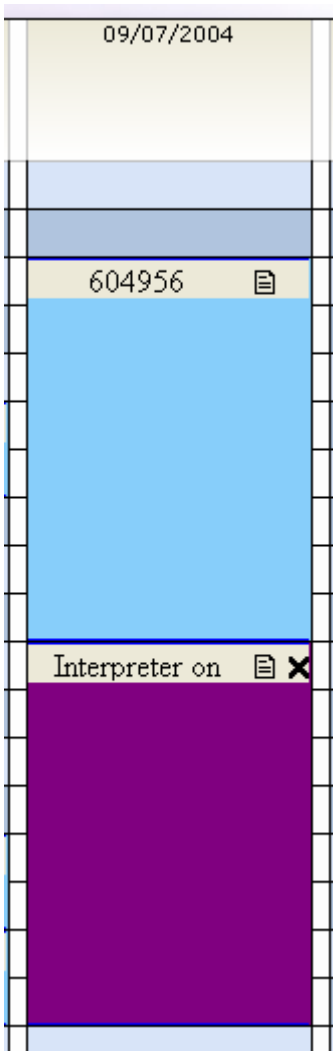
(4) Select a contiguous range of day cells



This will display the following prompt so that you can enter the notes relating to the unavailability



Enter the text and click on the 'OK' button



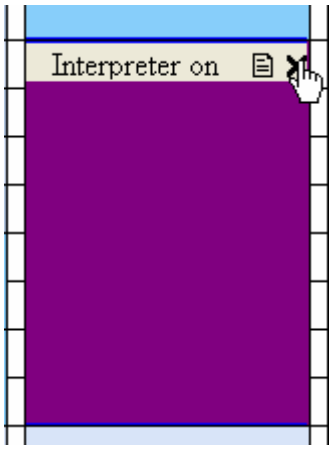
The availability of the interpreter is entered and is shown in purple colour. You can edit the text for this by:

(5) Clicking on the notes icon shown within the booking

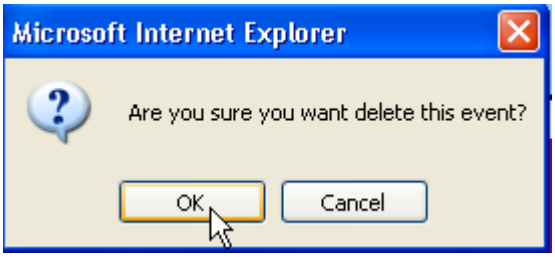
(6) Clicking twice on the notes (which may not all be visible). Once to select the event and the second time to view the notes

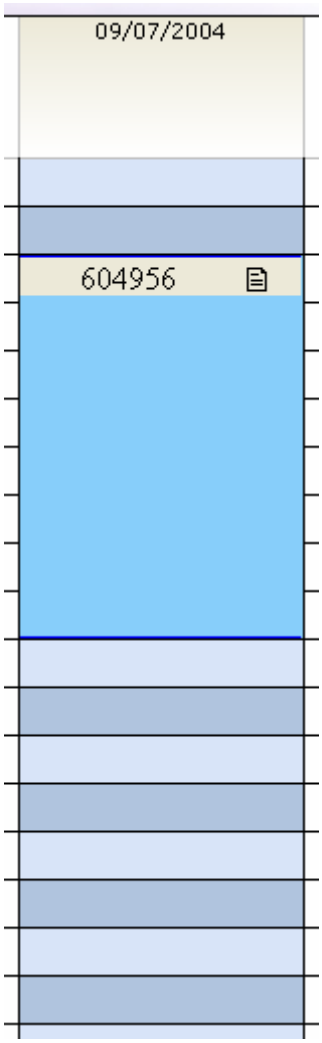
3.6.8 Deleting Interpreter Unavailability

To delete the event showing the Interpreter's unavailability click on the X on the top right of the event:



Then click on the 'OK' button and the event will be deleted.




09/07/2004
604956